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ABSTRACT

A study determined what trainers considered to be the most frequent problems they faced as beginners delivering training to adult learners. Experts were then asked to respond to these problems with solutions they found to be effective. A literature review was conducted that focused on two distinct elements: the human learning principles and needs of the adult learner and a review of the competencies and instructional techniques required for the person who delivers training. Two surveys were used in the study. The first survey was sent to the entire membership of the Southern Minnesota Chapter of the American Society for Training and Development (N=984). Data for analysis were provided by 371 completed questionnaires. A list of 1,098 training delivery problems was derived. Responses were sorted and synthesized into 12 training delivery problems, which fell into 3 basic categories: those pertaining to the trainer, those describing how the trainer relates to trainees, and those pertaining to presentation techniques. Following this, questionnaires that requested solutions to these problems were developed and sent to 36 people identified as experts in delivering training; 20 responses were returned. The three or four suggestions that appeared most frequently were the basis for a job aid document consisting of three parts: (1) a list defining the 12 most common delivery problems of beginning trainers; (2) a list of expert solutions to the problems; and (3) a combination of sections 1 and 2 that provides more detail and description for each topic. Appendixes make up the bulk of this document. They include a list of 20 references; surveys; survey responses; and correspondence.) (YLB)

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TRAINING AND DEVELOPMENT RESEARCH CENTER

Project Number Thirty-Seven

TRAINING DELIVERY PROBLEMS: AN ANALYSIS OF NOVICE AND EXPERT TRAINERS

Sandra K. Falkman

May 1990

university of minnesota
DEPARTMENT OF VOCATIONAL AND TECHNICAL EDUCATION • ST. PAUL, MINNESOTA

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TABLE OF CONTENTS

CHAPTER 1 Introduction....3
Needs Statement....4
Purpose....5

CHAPTER 2 Review of Related Research....7

CHAPTER 3 Methodology....15
Survey of Beginning Trainers....16
Identification of Delivery Problems....18
Selection of Experts....18
Survey of Experts....20
Preparation of the Job Aid....20

CHAPTER 4 Analysis of Data....22
Job Aid....23

CHAPTER 5 Summary and Conclusions....28
References....29

APPENDICES

Appendix A....33
Pilot Questionnaire....35
Correspondence to ASTD/SMC....36
Delivery of Training Survey....37
Survey Data....38
Group Synthesis....77
Total Synthesis Matrix....79
Appendix B....80
Correspondence to ASTD officers....82
Correspondence to University of Minnesota Faculty....83
Nomination Form....84
Appendix C....85
Correspondence to Experts....87
Expert Questionnaire....88
Experts Responses to Training Problems....91
Experts Participating in the Survey....116

Chapter 1

Introduction

Education, which includes the area of adult learning, is one of the oldest disciplines within the social sciences. The basic techniques used in education today have changed very little during the past 200 years (Cohen, 1964). However, adult learning in the workplace in recent years has signaled change for education.

During the past three decades, the training of adults has taken on a significant role in industry and business. Driven partly by rapid technological advances in the workplace, the emphasis on training adults is also a result of the corporation's concern for profit in today's marketplace. Through training, a company is able to increase both the effectiveness and efficiency of its workers. Effectiveness is measured by a behavioral change the trainee makes when applying the skills learned through training (Koehorst & Verhoeven, 1986). Efficiency refers to the increased competence of the employee who, in turn, will be more productive. Therefore, the results of training can be higher profits for the organization (Swanson, 1982).

Training, as used in this paper, is "the presentation of controlled information and practice resulting in performance of criterion behavior by the learner which allows evaluation" (Swanson & Sisson, 1985, p. 3). There are, basically, three types of training: skills and technical training, management training, and motivational training. When skills and technical training are addressed, a worker uses either a machine or a process, as in a manufacturing environment. Management, or subject matter, training involves either interactions between workers or interaction between workers and ideas. Topics in this area might include communication within the organization, time management, or decision making. Motivational training focuses on altering and developing the trainee's beliefs or attitudes. Often there is a fine distinction, as well as an overlap, between the various types of training (Swanson, 1982).

Beginning trainers are hired to deliver a wide variety of training, depending on the organization's needs and resources. As they become more experienced, these trainers are often given added responsibilities, such as course design. Most trainers were not graduates of programs specifically designed to train trainers. Generally they have been subject matter experts in their organizations and have good communication skills. Their preparation has often followed a military model. That is, first they complete a course as a student, and then they are expected to teach the course to other employees in the same manner.

Needs Statement

Continuing criticism of the training profession has included the lack of research about the processes used to select instructors, the evaluation methods used to rate the instruction, and the evaluation methods used to rate the instructor (Swanson, 1982). As training in industry and business continues to increase, there will be a greater need to determine exactly what constitutes effective and efficient training. Logically, the trainers themselves should be excellent resources for identifying present training problems. At the same time, the body of knowledge possessed by expert professional trainers could be tapped in response to these problems. An analysis of this source of information would be useful and relevant for practitioners in the training profession, as well as for those who train trainers.

Purpose

Little has been written about the ways in which expert trainers handle difficult delivery situations in the training classroom. And yet, specific techniques for dealing with such concerns would certainly help novice trainers.

In response, there were three purposes for this project: (a) to determine the difficulties novice trainers experience during the delivery of training, (b) to gather reports of experts on how they handle such situations, and (c) to synthesize this information into a job aid that defines the problems and gives specific solutions. The research is limited to the "implementation" phase of the Training Technology System (TTS) model, and it focuses only on the delivery of training (Swanson & Sisson, 1985).

The numerous problems that novices encounter in delivering training were synthesized into a concise list of twelve basic problems. This list was presented to a group of expert trainers who had gained recognition for their outstanding presentation skills. They were asked to describe specific techniques they had used when encountering similar situations.

The final product is a document, in the form of a job aid, that provides novices with expert advice about managing those problematic situations. This job aid also can be helpful for experts in the profession because it highlights additional delivery techniques that they can use in their presentations. Such a document can also be valuable for those who train trainers because, if they know the problems novices face, they can provide information about how to handle such difficult situations.

Chapter 2

Review of Related Research

Training and development has grown dramatically during the past three decades. Since the mid-1980s, it has become a 30 billion dollar profession. Each year, 15 million employees participate in 17.6 million courses. One out of every eight American workers attends a formal training course every year (Chakiris & Rolander, 1986).

This chapter is a survey of the literature on training and development, with a focus on two distinct elements. It is divided into two sections. The first section is a review of human learning principles and a discussion of the needs of the adult learner. The second section is a review of the competencies and instructional techniques required for the person who delivers training. Many authors offer specific techniques to help beginning and experienced trainers to enhance their delivery. However, although many try to define and provide advice for handling problems that trainers experience, there is little actual research into what constitutes the _major_ problems. This results in the solving of a group of problems without actually creating a taxonomy of those problems.

There are three domains of learning that operate in conjunction with one another. The broadest domain is the cognitive. To influence cognitive learning effectively, a top-down approach, from general knowledge to specific knowledge, is advocated. In this domain, a variety of objectives, as well as strategies for sequencing information, are needed to meet specific learning goals. These strategies are actually variations of the simple to complex approach (Reigeluth & Curtis, 1987).

Many of the techniques used for cognitive learning are also effective for acquiring motor skills, the second learning domain. It has been recognized only recently that a relationship exists between cognitive and motor skills. Previously, this domain was largely ignored. The significance of such a relationship for the training profession is that most industrial training is based on the motor skills needed to perform a task, and the key elements needed for effective transmission of motor skills are demonstration, practice, and informative feedback, or evaluation, of performance.

The third learning domain, affective learning, includes acquiring attitudes, values, and beliefs about a subject through the use of such techniques as behavior modification (Reigeluth & Curtis, 1987).

Learning is a multi-stage process. This process begins with the learner's perception of information, which is then transferred into short-term storage. Rehearsal is necessary for that learning to be used effectively. This process is then followed by semantic encodings through which the learner transfers the new knowledge into long-term storage; after this, the learner is able to retrieve the knowledge when necessary. Instruction is a method of externally designing information in order to utilize the internal processes that comprise learning (Gagne, 1987).

In 1968, Gagne identified nine "events" that are considered crucial for instructional design:

- Gain attention
- Inform the learner of the learning objectives
- Stimulate the recall of prerequisite learning

- Provide learning guidance
- Elicit performance
- Provide feedback about performance correctness
- Assess performance
- Enhance performance and transfer

Selection of instructional approaches depends on many criteria, such as conditions of learning, content, and characteristics of the students (Gagne, 1987).

Teaching content to children and adults requires different strategies. Malcolm Knowles suggested that four concepts can be used to define adult education: (a) the self-concept of the learner, (b) the learner's experience, (c) the learner's readiness to learn, and (d) the learner's perspective of time (cited in Decker & Nathan, 1985).

In terms of self-concept, adults are autonomous and want to be treated with respect. Hence, this type of learning situation invites input from the participants about the content; it allows for cooperation, rather than competition among participants; and it requires that the instructor serve as a facilitator. Adult learners have had experiences that can be incorporated into the learning situation by the instructor. At the same time, the learning situation can include such experiential learning as role plays, teamwork, group discussions, and actual hands-on experience. Because most adults have mastered basic reading and writing skills, they are able to identify their learning needs and the sequence through which they want to learn. In this case, the effective instructor acts as a resource person. Adult education is more effective when it is problem-centered and when it focuses on defining problems and dealing with them in the present (Decker & Nathan, 1985).

Zemke and Zemke (1988) have further defined the specific needs of adult learners. The following are some specific examples.

- In a classroom training situation, it is important that the environment be comfortable, both physically and psychologically.
- Trainers must understand the participants' expectations of the course, because the self-concepts of the participants are involved.
- By serving as a facilitator or orchestrator, the effective instructor can manage the classroom by allowing participants to share their experiences and knowledge, can integrate new knowledge, and can provide strategies that will allow transfer of learning back to the job.

Understanding both the basic ways in which people learn and the unique needs of the adult learner is important for the professional trainer. In addition, an instructor must use presentation skills that will enhance student learning. This section describes important competencies needed for delivering training, and it summarizes the components required for successful presentations.

The teaching/learning situation includes two primary actors: the instructor and the student. But such a situation is not easily defined because there are many types of good instructors who use a variety of styles. Broadwell (1978) stated that there are four characteristics of a student who is receiving good instruction: (a) involvement, (b) participation, (c) building on existing knowledge, and (d) better performance on the job. It is generally agreed that instructors can use certain techniques to help students achieve these characteristics.

In addition to the process in which the instructor and student are actors, two types of behavior, active and passive, occur during a teaching/learning experience. Using the four characteristics mentioned previously, Whitman (1981) concluded that there are only five basic methods of teaching: group discussion, lecture, tutorial, preceptorship, and independent study. He concluded that a passive role for both teacher and learner allows neither teaching nor learning to occur. Ideally, the instructor will choose the best technique, according to the learning objectives (Whitman, 1981). Understanding the basic methods of instruction and knowing the competencies for managing the training situation can help the novice trainer maximize the learning process for the participants.

In 1983, the American Society for Training and Development (ASTD) conducted a thorough study of the topic Human Resource Development. The study defined training as "identifying, assessing, and through planned learning, helping develop key competencies which enable individuals to perform current or future jobs" (McLagan, 1983, p. 129).

A variety of behaviors and competencies comprise training and development. For the purpose of this project, the focus was on group facilitation, presentation, and instruction skills included in the interfacing cluster (McLagan, 1983) and comprising the delivery aspect of training.

Facilitation skills are the skills an instructor uses when "managing group discussions and group process so that individuals learn and group members feel the experience is positive" (McLagan, 1983, p. 71). Both verbal and nonverbal skills bring about learning. Gestures, facial expression, eye contact, proximity to the learner, and rate and volume of the verbal presentation are nonverbal skills that many instructors use without thinking about it. Awareness of the effects of these behaviors can positively enhance learning. Silence, wait time, and pause time are often overlooked, yet they are important for generating discussion (Bailey, 1984). The ability to frame questions is essential for effective group discussion. In this regard, there are two types of questions--content and context. Content questions are prepared by the trainer in advance, and they fit into the framework of the discussion. In contrast, context questions are used to challenge assumptions that evolve from the content of the discussion, and they require that the trainer be an active listener, as well as someone who can competently frame questions spontaneously (Smallwood, Hiebert, & Flood, 1983). Because open-ended questions generate discussion, the trainer's ability to them use is crucial for the success of the program.

Group process skills are the skills needed by a trainer when managing participants. A trainer must establish a climate that will encourage the quiet person to participate more freely, and inhibit, to some degree, the person who tends to monopolize the discussion. By using appropriate nonverbal cues and by involving the group in a variety of activities, (e. g., small groups and role plays), both types of people can feel comfortable and acknowledged (Cornwell, 1979).

Presentation skills are needed for a trainer to communicate well. These may include using an attention-getting opener, adjusting the instruction to the group, providing personal stories that add interest to the program, and working from an outline (McLagan, 1983). The introduction to a course is a key element; some even say that this is the most important part. Here, the instructor gains credibility with the group by having the attitude of an expert (Ricks, 1977).

It is important for the novice trainer to remember that the instructor is the guide for the learning, just as the participant is the active learning agent. Trainees need to believe that they have some control and input into the course. This can be accomplished in a variety of ways, including (a) establishing a class community, (b) encouraging participation, (c) validating people and their experiences, and (d) forming in-course and post-course group objectives. Through these actions, the instructor/student relationship is neutralized, and the instructor becomes a guide for learning (Ricks, 1977).

Instructor skills are the skills needed by a trainer when using structured learning events, such as group discussions, presentations, role plays, and case studies. These skills also include assessing learners' needs, using media and materials, administering exams or instruments, and providing feedback to participants (McLagan, 1983). Good instruction and learning do not simply happen; they require preparation and practice. If the course has already been designed, it must be rehearsed, and the trainer must adjust it to meet the needs of the group. The instructor must have an adequate amount of material to present, a variety of activities from which to choose, and a time frame in mind for each activity. According to Pike (1988), changing the pace of instruction every 20 minutes keeps learners active. He also found that the amount of learning that occurs is directly proportionate to the amount of fun the learners have. Although the participants themselves create the fun, it is the result of good lesson design and delivery.

Of course, experience in training improves instruction. But what about novices? Pretending to have experience is not a good idea, because if the participants find out, the trainer will lose credibility. For the novice, there are many self-helps to use while they gain experience. The best substitute for experience is becoming familiar with manuals, procedures, and the media. Also, spending time on location, asking questions, investigating, listening, and having an opportunity to try the work all provide "substitute experience" (Broadwell, 1975). It may be helpful for the novice trainer to remember that the instructor's main role is to facilitate learning. Therefore, experience with the material is less important than the instructor's experience with facilitating learning (Broadwell, 1975).

Many journal articles and "how to" books have been written for the trainer. Although these are interesting to read and offer worthwhile suggestions, they are usually not research-based. More research is needed to determine which instructional techniques actually facilitate learning in a training environment. Because training is an important function in today's corporations, it should not be performed haphazardly. Rather, the effects that training can have on improving the quality of workmanship and, therefore, the efficiency and effectiveness of trainees, warrant that we (as researchers) learn more about how to improve and expand the existing body of knowledge. This thesis is a call for more research regarding the aspects of adult learning that comprise training. It is important that the issues surrounding adult learning be defined more clearly. It is just as important for researchers to find new ways to enhance teaching and learning, which will allow for the transfer of new skills and attitudes back to the job.

Chapter 3

Methodology

The job aid was developed to help beginning trainers overcome difficult delivery problems, as well as to provide additional expertise to veteran trainers. The initial survey identified the major problems. Experts were selected and sent questionnaires. They responded to the problems with techniques they had used successfully when handling the same problems.

Figure 1 is an illustration of the general methodology for this study. The project was begun in January 1989, and completed in July 1989.

Figure 1. General Methodology

STEP 1
Survey membership of SMC/ASTD
to determine the most frequent
training problems that beginning
trainers experience.

STEP 2
Analyze and synthesize survey results
to select 12 problems.

STEP 3
Identify experts to respond to
problems that beginners find
most prevalent.

Step 4
Survey the experts through a questionnaire
describing these problems. Have experts
give suggestions/solutions.

STEP 5
Prepare a job aid
that lists problems, general
solutions, and specific solutions.

STEP 6
Prepare a final report.

Survey of Beginning Trainers

To determine the ten to fifteen problems most frequently encountered by beginning trainers during delivery, a questionnaire was developed. Questions covered the number of years and months that person had been a trainer, the percentage of job role that was devoted to training, the type of training (management, motivational, or technical) he or she was delivering, and the problems encountered during the first two years on the job. The completed first draft survey questionnaire was pilot-tested with twenty-five students in a University of Minnesota graduate-level class on Training in Industry and Business (see Appendix A).

The questionnaire was revised based on the pilot test. It was then sent to the entire membership of the Southern Minnesota Chapter of the American Society forTraining and Development (SMC/ASTD). Of the 984 forms that were mailed, 420 were returned. Some of the returned forms were unusable for various reasons (e. g., blank, problems not listed, returned too late, etc.). The data for the analysis were provided by 371 questionnaires. A list of 1,098 training delivery problems was derived from the 371 questionnaires (see Appendix A).

Each of the responses was printed on a note card and sorted into categories. The method used for sorting the data is known as the KJ Method: Affinity Diagrams (Mizuno, 1988). This method, developed by Kawakita Jiro of the Kawakita Research Institute, is used to analyze data that are elusive, confusing, and disorganized. Groupings are made by mutual affinity of the data. The process has seven steps.

- Choose a theme.
- Collect the data.
- Put data onto cards.
- Sort the cards into categories.
- Label the cards.
- Draw the diagrams.
- Present the data.

Essentially the technique is a right-brain process (Mizuno, 1988). Those involved in the sorting were directed to use their intuition and creativity to interpret and group the data, as opposed to sorting by analysis and reasoning. Nine people were involved in the sorting process--two University professors, six graduate students, and one professional trainer. Sorters worked in three pairs and one triad. Each group was given one fourth of the cards. In the small groups, the cards were read slowly, once or twice. Cards that contained similar ideas were grouped together on the basis of their affinity or commonality. After the cards had been grouped, they were labeled. The label consisted of words written on a blank card that conveyed the meaning of the cards in that group. The labeled groups of cards was then treated as a single card (Mizuno, 1988).

Identification of Delivery Problems

When the groups had finished sorting, they compiled a list of 12-15 problems. Each group wrote its list on a blackboard, explained the problems, and defended the rationales behind the problems. A matrix was developed to synthesize the topics into twelve training delivery problems. Each group had numbered its topics, and each number was added to the matrix so that all the problems relating to delivery were represented on the matrix (see Appendix A).

The twelve problems fell into three basic categories: (a) those pertaining to the trainer, (b) those describing how the trainer relates to the trainees, and (c) those pertaining to presentation techniques.

Selection of Experts

A variety of distinctions can be drawn between novices and experts. According to research studies, the major difference is mainly intellectual. Because experts have a broader knowledge base than novices, they solve problems in a different manner. Experts have more focus, recognize cues that allow them to recall "chunks" of information, and are better able to integrate and interconnect knowledge. The knowledge that novices possess may be descriptive at a superficial level. In contrast, experts are able to troubleshoot and make interpretations about information. By using cues to access the stored knowledge they possess, experts are able to assess the situation at hand and devise an action plan that will work effectively (Thomas, 1988).

The goal of this aspect of the project was to establish a list of such experts in the field of training, specifically those who had distinguished themselves through their outstanding delivery skills. Once identified, these experts were presented with a list of the twelve most common training delivery problems, which had been identified by the beginning trainers on the survey questionnaire. The experts were asked to respond to the problems with specific techniques they had used successfully to overcome similar situations during training presentations.

The selected experts were practitioners who had delivered training in the field for a minimum of two years. It was also important that these experts were recognized by either colleagues or academicians as successful trainers.

To obtain names of these experts, a nomination form was sent to the eight officers of the Southern Minnesota Chapter of the American Society for Training and Development (SMC/ASTD). The twelve-member teaching staff for training and development classes at the University of Minnesota were also asked to nominate experts. Both groups were sent an identical form on which they were asked to nominate up to six people whom they considered to be expert "deliverers" of training. They were asked to provide the company name, address, and telephone number of the nominees. Three ASTD officers responded, producing 15 names. The survey of the university faculty produced six (6) responses and 28 names. The total of 43 names was reduced to 36, because of duplication.

Survey of Experts

The Expert Questionnaires were sent to the 36 people who were identified as experts in delivering training. These experts were asked to give their names, companies, and telephone numbers. They received a two-sided legal-sized form on which they were asked to respond to the twelve delivery problems that had been identified by the beginning trainers. Each problem was described with one word and then followed by a sentence that provided further description. These experts were asked to give specific solutions.

Of the questionnaires sent, 20 responses were returned. Most of the experts responded in detail to all of the questions (see

Appendix C). These responses were typed and sorted into categories. Similar responses were grouped. The three or four suggestions that appeared most frequently for each difficult training situation became the basis for the job aid. The unedited list of responses can be found in Appendix C.

Preparation of the Job Aid

The final job aid is a three-part document. The first part, entitled "The 12 Most Common Delivery Problems of Beginning Trainers," lists and defines these problems. Each problem is stated in one to three words, followed by one or two sentences to further define it.

The second part of the job aid, "Expert Solutions to the 12 Most Common Delivery Problems of Beginning Trainers," lists each of the 12 key problems. Solutions (one to four) for each particular problem are given in a short phrase format.

The third part of the job aid, "The Twelve Most Common Delivery Problems of Beginning Trainers And Their Solutions," combines the first two sections, that is, it lists each of the 12 one-word problems. In addition, the solution phrases are followed by sentences (one or two) that explain the solution in greater detail.

Chapter 4

Analysis of Data

The job aid that follows summarizes the information collected by the two surveys. The purpose of the first survey was to determine the major delivery problems of beginning trainers. The purpose of the second survey was to have experts propose solutions for handling these problems.

The job aid has three sections. The first section, entitled " The Twelve Most Common Delivery Problems of Beginning Trainers," is a synthesis of the results of the first survey. It lists and briefly explains the 12 most common problems of beginning trainers, based on the 1,098 individual responses of the 371 surveyed trainers. The second section of the job aid is entitled "Expert Solutions To The Twelve Most Common Delivery Problems of Beginning Trainers." Essentially, it is a topical outline that synthesizes the responses of the 20 surveyed experts. Section three, "The Twelve Most Common Delivery Problems of Beginning Trainers And Their Solutions," expands on the short statements of section two by giving more detail and description for each topic.

Each section is a stand-alone job aid. The three can also be used together because each section explains further and builds on the preceding section.

The Twelve Most Common Delivery Problems of Beginning Trainers*

Sandra K. Falkman
Training and Development Research Center
University of Minnesota, 1989

1. **FEAR.** Beginning trainers experience a lack of confidence (or anxiety) during the delivery of training.
2. **CREDIBILITY.** Beginning trainers perceive that they lack credibility as subject matter experts.
3. **PERSONAL EXPERIENCES**. Beginning trainers lack personal experiences or stories to incorporate into the training that relate to a specific organization or subject matter.
4. **DIFFICULT LEARNERS**. Beginning trainers have trouble knowing how to handle the trainee who presents a behavior problem. This may include people who are angry, passive, or dominating.
5. **PARTICIPATION**. Beginning trainers have trouble getting people to participate.
6. **TIMING**. Beginning trainers have trouble with timing or pacing the training. They also worry about having too much or too little material.
7. **ADJUSTING INSTRUCTION.** Beginning trainers find it difficult to adjust the training to the needs of the learners. They also find it difficult to redesign their presentation during delivery.
8. **QUESTIONS.** Beginning trainers have difficulty using the questioning technique effectively. They also may have trouble responding to difficult or unanswerable questions.
9. **FEEDBACK.** Beginning trainers are unable to "read " the trainees in order to make adjustments and use formative evaluations effectively.
10. **MEDIA, MATERIALS, FACILITIES**. Beginning trainers are concerned about how to use media and materials effectively. They also are concerned about breakdowns.
11. **OPENING/CLOSING**. Beginning trainers need techniques to use as ice-breakers and introductions. They also need effective summaries and closings.
12. **DEPENDENCY ON NOTES.** Beginning trainers feel too dependent on notes. They have trouble determining ways to present information without notes.

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*Based on a survey of 371 trainers and their 1,098 individual responses. 3/8/89

EXPERT SOLUTIONS TO THE TWELVE MOST COMMON DELIVERY PROBLEMS OF BEGINNING TRAINERS*

Sandra K. Falkman
Training and Development Research Center
University of Minnesota, 1989.

1. **FEAR**
    A. Be well prepared.
    B. Use ice breakers.
    C. Acknowledge fear.

2. **CREDIBILITY**
    A. Don't apologize.
    B. Have the attitude of an expert.
    C. Share personal background.

3. **PERSONAL EXPERIENCES**
    A. Report personal experiences.
    B. Report experiences of others.
    C. Use analogies, movies, famous people.

4. **DIFFICULT LEARNERS**
    A. Confront problem behavior.
    B. Circumvent dominating behavior.
    C. Use small groups for timid behavior.

5. **PARTICIPATION**
    A. Ask open-ended questions.
    B. Plan small-group activities.
    C. Invite participation.

6. **TIMING**
    A. Plan well.
    B. Practice, practice, practice.

7. **ADJUST INSTRUCTION**
    A. Know group needs.
    B. Request feedback.
    C. Redesign during breaks.
8. **QUESTIONS**
    Answering questions:
    A. Anticipate questions.
    B. Paraphrase learners' questions.
    C. "I don't know" is okay.
    Asking Questions:
    A. Ask concise questions.
    B. Defer to participants.

9. **FEEDBACK**
    A. Solicit informal feedback.
    B. Do summative evaluations.

10. **MEDIA, MATERIALS, FACILITIES**
    Media:
    A. Know equipment.
    B. Have backups.
    C. Enlist assistance.
    Material:
    A. Be prepared.
    Facilities:
    A. Visit facility beforehand.
    B. Arrive early.

11. **OPENINGS AND CLOSINGS**
    Openings:
    A. Develop an "openings file".
    B. Memorize.
    C. Relax trainees.
    D. Clarify expectations.
    Closings:
    A. Summarize concisely.
    B. Thank participants.

12. **DEPENDENCE ON NOTES**
    A. Notes are necessary.
    B. Use cards.
    C. Use visuals.
    D. Practice.

•Based on a survey of 20 experts and their individual responses.

The Twelve Most Common Delivery Problems And Their Solutions

Sandra Falkman
Training and Development Research Center
University of Minnesota, 1989

1. **FEAR**
    - A. Be well prepared. Expert trainers have a detailed lesson plan, understand the material, and practice their presentation.
    - B. Use ice breakers. Experts use ice-breakers and begin with an activity that relaxes participants and gets them to talk and become involved.
    - C. Acknowledge the Fear. Experts understand that fear is normal, confront what makes them afraid, and use positive self-talk or relaxation exercises prior to the presentation.

2. **CREDIBILITY**
    - A. Don't apologize. Experts are honest about the subject matter and explain that they are either experts or conduits.
    - B. Have an attitude of an expert. Experts are well prepared and well organized. They listen, observe, and apply what they know to what the participants know.
    - C. Share Personal Background. Experts talk about their areas of expertise and the variety of experiences they have had.

3. **PERSONAL EXPERIENCES**
    - A. Report personal experiences. Experts tell their personal experiences, sometimes asking themselves probing questions to uncover them.
    - B. Report experiences of others. Experts collect pertinent stories and incidents from other people and/or have participants share their experiences.
    - C. Use analogies, movies, or famous people. Experts use familiar incidents or situations in order to relate to the subject.

4. **DIFFICULT LEARNERS**
    - A. Confront problem learner. Experts use humor. They may also talk to the individual during a break to determine the problem or to ask the person to leave.
    - B. Circumvent dominating behavior. Experts use nonverbal behavior, such as breaking eye contact or standing with their backs to the person and inviting the others to participate.
    - C. Small groups for timid behavior. Experts find that quiet people feel more comfortable talking in small groups or dyads. They structure exercises where a wide range of participation is encouraged.

5. **PARTICIPATION**
    - A. Ask open-ended questions. Experts incorporate questions into the lesson plans and provide positive feedback when people do participate.
    - B. Plan small group activities. Experts use dyads, case studies, and role plays to allow people to feel comfortable, to reduce fears, and to increase participation.
    - C. Invite participation. Experts structure activities that allow people to share at an early time in the presentation.

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*Based on a survey of 20 experts and their individual responses.

6. **TIMING**

A. Plan Well. Experts plan for too much material, and some parts of the material are expendable. They prioritize activities so that parts may be deleted, if necessary.

B. Practice, practice, practice. Experts practice the material many times so they know where they should be at 15-minute intervals. They make sure there's a clock in the training room.

7. **ADJUST INSTRUCTION**

A. Know group needs. Experts determine the needs of the group at an early time in the training and structure activities and processes based on those needs.

B. Request feedback. Experts watch for signs of boredom and ask participants either during breaks or periodically during the session how they feel about the training.

C. Redesign during breaks. Experts find it helpful to have contingency plans and, if necessary, to redesign the program during a break. Redesigning during delivery is not advocated.

8. **QUESTIONS**

Answering Questions:

A. Anticipate questions. Experts prepare by putting themselves in the participant's place and by writing out key questions learners might have.

B. Paraphrase learners' questions. Experts repeat and paraphrase participants' questions to ensure that everyone has heard the question and understands them.

C. "I don't know"is okay Experts redirect questions they can't answer back to the group' s expertise. They try to locate answers during breaks.

Asking Questions:

A. Ask concise questions. Questions are a great tool for experts. They ask concise, simple questions and provide enough time for participants to answer.

9. **FEEDBACK**

A. Solicit informal feedback. Experts ask participants, either during class or at the break, if the training is meeting their needs and expectations. They also watch for nonverbal cues.

B. Do summative evaluations. Experts have participants fill out forms at the conclusion of training to determine if the objectives and needs of the group were met.

10. **MEDIA, MATERIALS, FACILITIES**

Media:

A. Know equipment. Experts know how to fully operate every piece of equipment that they use.

B. Have back-ups. Experts carry a survival kit of extra bulbs, extension cords, markers, tape, etc. They also bring the information they are presenting in another medium.

C. Enlist assistance. Experts are honest with the group if there is a breakdown and ask if anyone can be of assistance.

Material:

A. Be prepared. Experts have all materials ready and placed at each participant's workplace or stacked for distribution.

Facilities:

A. Visit facility beforehand. Experts visit a new facility ahead of time, if possible, to see the layout of the room and to get an idea of where things are located and how to set up.

B. Arrive early. Experts arrive at least one hour in advance to ensure enough time for setting up and handling problems.

11. **OPENINGS AND CLOSINGS**

Openings:

A. Develop an "openings file." Experts rely on the many sources for ice-breaker ideas. Through observation and experimentation, they develop ideas and keep a file of them.

B. Memorize. Experts develop a great opening and memorize it.

C. Relax trainees. Experts greet people as they enter, take time for introductions, and create a relaxed atmosphere.

Closings:

A. Summarize Concisely. Experts simply and concisely summarize the contents of the course, using objectives or the initial model.

B. Thank participants. Experts thank participants for their time and their contributions to the course.

12. **DEPENDENCE ON NOTES**

A. Notes are necessary. Experts recognize that no one completely outgrows the need for notes.

B. Use Cards. Experts scale down their presentations to an outline or key words, which they write on notecards to use as prompts.

C. Use Visuals. Experts make notes on frames of transparencies and on their copies of handouts.

D. Practice. Experts learn the script well so that they can deliver it from the keyword notecards.

Chapter 5

Summary and Conclusions

Little research is available about the problems trainers face, even though the definitions of the problems and solutions by the trainers themselves would be pertinent to people within the profession. In response, this study had two major focuses: (a) to determine what trainers considered to be the most frequent problems they faced as beginners delivering training and (b) to have experts respond to these problems with solutions they have found to be effective. The conclusions from each of the two distinct surveys form the basis for the three-part job aid, which describes the 12 most common problems and presents the solutions to these problems (first in an outline form and then in a longer, more descriptive format).

The job aid is a concise synthesis of problems and solutions. However, Appendices A and C contain a rich source of information. The 1,098 responses to the "Problems Survey" are of interest and value to all novices in the field of training, as well as to those who train the trainer. The unedited solutions in Appendix C are filled with descriptive detail that benefit beginner and expert alike.

Although the solutions have been synthesized to keep the job aid brief and usable, there is value in reading the responses in their entirety. Professional trainers are well aware of the problems they confront in their jobs. They have also devised excellent solutions to overcome these problems.

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Appendix A

Delivery of Training Survey

CONTENTS

Pilot Questionnaire.....35
Correspondence to ASTD/SMC Membership.....36
Delivery of Training Survey.....37
Survey Data.....38
Group Synthesis.....77
Total Synthesis Matrix.....79

Appendix A: Pilot Questionnaire

Delivery of Training Survey

1. What type of training do you primarily deliver? (Check one type and provide examples).
   ____Management
   ____Technical
   ____Motivational

2. Number of months as a professional trainer
   _____Months

3. Percentage of your job devoted to training role
   ___100%
   ___More than 50%
   ___Less than 50%

5. As a beginning trainer, what problems or difficulties have you encountered during the delivery phase of training. Please be specific .

- ____
- ____
- ____
- ____

(Please feel free to use the other side of this questionnaire)

Name (optional): ____

Return address:
Sandy Falkman, Research Assistant
Training and Development Research Center
1954 Buford Ave.
St. Paul, MN 55108
624-1296 Survey Queset.

Appendix A: Correspondence to ASTD/SMC

January 20, 1989

Dear Colleague:

I am a research assistant at the University of Minnesota, working on a research project for the Training and Development Research Center. The project is also supported by the Southern Minnesota Chapter of the American Society for Training and Development (ASTD). The purpose of this project is to identify problems or difficulties that novice trainers experience during the delivery phase of training and to then have expert trainers report on the specific techniques which they use to handle these difficulties. This information will then be analyzed and packaged in a useful way to help beginning trainers.

Please complete the questionnaire and return it to me in the enclosed envelope as soon as possible. Thank you for your time and assistance with this project. Your contribution is very much appreciated.

Sincerely,

Sandra K. Falkman
Research Assistant

Appendix A: Delivery of Training Survey

Delivery of Training Survey

1. What is the length of time you have been a professional trainer?

___Years and ___Months

2. What percentage of your job is devoted to the role of training?

___100%
___More than 50%
___Less than 50%

3. What type of training do you primarily deliver? Please check one type.

___Management Training
___Technical Training
___Motivational Training

4. Provide sample program titles:____________________________________

____

5. As a beginning trainer, what problems or difficulties did you encounter during the delivery phase (or presentation) of training. Please be specific and feel free to use the other side of this questionnaire.

- ____
- ____
- ____
- ____

Name (optional): ____

Return address:
Sandy Falkman, Research Assistant
Training and Development Research Center
1954 Buford Ave.
St. Paul, MN 55108
624-1296

Appendix A: Survey Data

SURVEY DATA

1A--Training a group that at one time were your peers.
1B--Presenting topics that are mandated by job descriptions.
1C--"Have to be there," rather than "want to be there."
1D--Reoccurring training--keeping the level of enthusiasm.

2A--Competing for participant's time.
2B--Attitude of not wanting to be there.
2C--Reaching remote sites.

3A--Not involving the group enough.
3B--Not using enough variety of materials.

4A--Credibility with more seasoned managers.
4B--Lack of representative examples/experiences to relate in training.
4C--Turning "challenging" questions or statements into positive instructional outcomes.
4D--Evaluating the performance requirements of supervisors and managers (what exactly they had to know and what they must be able to do).
4E--Recognizing exemplary and adequate management actions in training situations.

5A--Fear.
5B--Not sure if I have the ability or knowledge to answer the questions that may come up.
5C--Forced to train in subject matter that I am not comfortable with or have a background in.
5D--Reading the audience.
5E--Being able to shift gears when the audience needs change.
5F--Not be stuck on a script--try to learn to flow with the group.

6A--How to handle problem participants--e.g., disrupters, challengers, bored or antagonistic types.
6B--Learning all the things that could go wrong with AVs, and what to do for Plan B.
6C--Feeling comfortable enough to change the format of activities if the group stalled. Mostly it was being inexperienced at following my hunches.

7A--Ice-breaking.
7B--Getting people involved.
7C--Appearing organized, but still spontaneous.
7D--Integrating personal experiences.

8A--Wonder if lesson plans are complete.
8C--Has subject been researched thoroughly to answer most questions.
8D--Is one, five, ten or fifteen day curriculum sequenced properly.
8E--Is there continuity?
8F--Had I been properly trained on platform skills?
8G--Not always having expertise of class participants prior to class starting; what types of questions can be anticipated?
8H--I learned to develop my test first and build lesson plans and visuals to support the important ideas and concepts I wished to relay whenever teaching insurance products content.
8I--If the room is set classroom style and a person in the front of the room is asking a question, repeat the question for the entire group.

9A--Lack of technical background.
9B--Low self-confidence.
9C--Lack of general experience, i.e., techniques.
9D--Heavy workload.

10A--Group confusion caused by unclear expectations of why they were there.
10B--Too strict adherence to the agenda on my part, where some flexibility would have been useful.
10C--Competing agendas--where participants just must leave mid-way because of another critically important meeting.

11A--"Internalizing" the content of the course. Understanding the overall philosophy versus covering all the points.
11B--Relaxing and listening to the participants.
11C--Rushing to get through versus assuring that participants understand.

12A--Employee apathy.
12B--My lack of presenting, questioning, answering, and group facilitation skills.
12C--Little resource material for this specialized field.

13A--Lack of confidence.
13B--Inability to flex.

14A--Group facilitation--staying on track.
14B--Handling career skeptics (especially the vocal ones).

15A--Deciding on the best ways to involve the learner.
15B--Transition between various topics in workshop.

16A--Giving up control and letting learners' needs dictate objectives.
16B--Learning good design skills.
16C--Stage fright.

17A--Establishing credibility.
17B--Refining my own style/humor in the classroom.
17C--Ensuring that there was adequate prep time; reviewing notes prior to the class.

18A--Timing.
18B--Content versus process.
18C--Obnoxious participants.

19A--Comfort level in front of a group.
19B--Ability to handle difficult, uncooperative participants.
19C--Trying to get too much information into the time allotted

20A--Lack of insight into the supervisor's perception of his or her job.

21A--Getting the participants interacting.
21B--Setting the climate.
21C--Timing of sections of the training.
21D--Following the outline completely.

22A--Facilitating discussions--keeping control, giving directions, etc.
22B--Timing with designs--things always seemed to take either too long or not long enough.
22C--Confidence in speaking.
22D--Group dynamics.

23A--As a coordinator--finding qualified people to teach on-site during the daytime hours.

24A--Knowing what skills I had or if I came across as effective or not.
24B--How to deal with students who didn't agree with the company's philosophy or approach to implementing a program.
24C--Participants questioned my experience of lack of it as a manager, or working in a line function.

25A--Keeping the attention of the audience focused on the subject.
25B--Credibility (I came up through the ranks with no formal education in training).
25C--Nervousness--wanting to sound calm, in charge.
25D--Lack of faith that people were learning and making useful changes in their work habits--am I making a difference?

26A--Acceptance of me.
26B--Acceptance of the materials I presented.
26C--Support of upper management.
26D--Needing more money to buy materials for program development.

27A--Self-confidence--the confidence that comes from knowing that you, the trainer, are worth listening to.
27B--It takes a while to learn how to put the responsibility of learning on the learner by involving them in activities and worksheets. This certainly helps take some burden off the trainer and improves the end result. Don't teach! Guide the learning!

28A--Controlling the group.
28B--Group dynamics.
28C--Use of audio/visual aids.

29A--Time management.
29B--Clarity of spoken word concepts.
29C--Observing audience while delivering (to see if I was connecting).
29D--Nervousness.

30A--Acceptance of my change in responsibility.
30B--Audience participation.
30C--Overcoming my own obstacles of "am I really a teacher?"

31A--Trying to be an "expert" in a new field.

32A--Being comfortable with the material.

33A--Timing/pacing the workshop.
33B--Processing with the group in a way that validates their expressed concerns, etc.
33C--Dealing with a dominant/dominating person in the group.

34A--Involving the audience--too much lecture.
34B--Maintaining comfortable pacing--tend to go too fast.
34C--Presenting the right level of detail--not too much or too little.

35A--Lack of participant involvement/participation.
35B--No control over no show/cancellation policy.
35C--Participants did not meeting prerequisite requirements--but were allowed to register.

36A--Keeping the dozen or so students at the same spot I wanted them on their computers while giving step-by-step instructions.
36B--Trying to get the "slower" students up to speed while covering the concerns and questions of those who were more proficient.
36C--I always have a first burst of jitters before the class begins.

37A--Pacing of material.
37B--Confidence.
37C--Dealing with "dissidents."

38A--Organizing materials--flow from one unit to the next was not as smooth as I would like.
38B--Fielding tough questions.
38C--Noncooperative participants.

39A--Lack of knowledge about the variety of training techniques.
39B--Minimal understanding of group process and group facilitation skills.
39C--Timid about being creative.
39D--Structure was too rigid--focused on my need to deliver training as opposed to learners' needs.

40A--Dealing with difficult/hostile learners.
40B--The time it took to develop expertise in a given subject.
40C--Lecturing--took a while to get comfortable with it.
40D--Nervousness/jitters/stage fright.

41A--Getting participants involved who have been **told** to attend a workshop.
41B--Making transitions from one topic to another.
41C--Giving specific feedback to participants.
41D--Creating relevant examples/analogies.

42A--Opening a speech or session.
42B--Developing stories, especially with humor.
42C--Know how much material to put into a session.
42D--Developing meaningful graphics/visuals.

43A--Tailoring "canned" program to audience as I was delivering it . . . making it **real** for them.

44A--How to organize material to enhance presentation.
44B--Knowing what material warranted visual presentation (in the form of overhead projector or slides).
44C--Not knowing the amount of detail I needed to present to enhance presentation.

45A--Striking a balance between how much I, as instructor, should set the rules and structure the learning and how much my adult students would have a say in that.
45B--Evaluation of the learning.
45C--How much time to devote to each activity.
45D--Creating **good** transparencies and support materials.

46A--Use of visual aids for the best impact.
46B--Handling the "I don't want or need to be here" participant.
46C--Handling "what do you know about my job . . . you've never done it."

46D--Finding ways to keep the group active and participating.
46E--Staying away from lecturing.

47A--Knowing my audience. Were they interested learners or not?
47B--Insecurity; fear of being judged.
47C--Is the information meeting their need?
47D--Taking the time to get the group to relax.
47E--Didn't use pertinent examples for group. Couldn't talk their language.

48A--Lack of formal teaching education.
48B--Inadequate product training.
48C--Lack of supporting materials: manuals, overheads, exercises.
48C--When a student was having difficulty understanding a concept, it wasn't easy to come up with another way to approach the problem.

49A--I was too detailed.
49B--I found it hard to involve participants.
49C--Once involved, I found it hard to keep the time each individual took up to a fair amount.

50A--Handling difficult behavior.
50B--Awareness of audience needs.
50C--Using various training media.
50D--Gaining credibility.

51A--Learning to see questions as content-directed, not instructor-directed (that is, learning not to take questions/objections personally).
51B--Learning to disassociate "hearing" with "learning"--the learner must hear, listen to, understand, process, evaluate, practice, and commit in order to really "learn" the material.

52A--Timing.
52B--Having insufficient experience to give good examples.
52C--Not having done some of the things I was teaching--confidence.
52D--Handling resistance.

53A--Making the workshop FUN.
53B--Knowing how and when to use humor.
53C--Realizing the importance of upper management support for the training.
53D--Making sure the workshop style and format hit all four learning and personality profiles.

54A--Feeling confidant about lack of depth of knowledge of subject.

55A--Going too much by the outline and not putting enough of myself into the content.
55B--Controlling the one or two "over contributors."

56A--Unwillingness to participate in role play activities on the part of union employees.

57A--Lecture too much--poorest teaching method.
57B--Assume knowledge equals skills.
57C--Not using audience knowledge and experiences.

58A--Getting the audience involved.
58B--Using audio visual aids effectively.
58C--Relaxing--not talking too fast; going over information too quickly.

59A--Keeping abreast of information that is critical to session.
59B--Follow through to make sure training is being applied.
59C--Changing facial expressions, smiling.
59D--Not being intense, having more vocal variety.

60A--Self-confidence to train in areas in which I was not expert.
60B--Designing training for learning-impaired adults.
60C--Being patient with the adult learning process.
60D--Training and not teaching or lecturing.

61A--Not making a sequential outline to follow.
61B--Not getting enough student participation.
61C--Assuming something was easy for students because it was clear to me.
61D--Making sure there was variety in way I did things.

62A--Keeping on track--it depends on the material. Purchased materials are harder to deliver than those I've developed.

63A--How to overcome pre-session "butterflies."
63B--Answer questions in a way that satisfies the participant.
63C--Making sure everyone understands what's being said.
63D--What to do when attention of the group slips.

64A--Adjusting quickly to audience needs when the type of audience is not known in advance.

65A--Pacing.
65B--Developing adequate repertoire of examples and stories to accompany technical or uniteresting content.
65C--Lack of experience in reading an audience resulting in low comfort level in adjusting delivery during presentation.
65D--Whole evaluation issue--not taking criticism personally; using more than "happy sheets."

66A--Adult "nonverbals"--especially if the employee did not want to attend the training program.

67A--Ice breakers seem to be necessary when training a group of new employees.
67B--Level testing of their computer or word processing skills to avoid losing them or talking down to them during presentation.
67C--When to provide assistance without "hovering" over their lab exercises.

68A--At first it was frightening to get up in front of a group of people.
68B--Knowing the subject well.

69A--Determining the amount of material required to have available for a two-, three-, or four-day seminar.

70A--Lacked confidence to speak without extensively detailed notes--almost a script.
70B--Difficult to make catchy lead-ins; those that make the first impression.
70C--Tendency to talk too fast and not allow for questions or answers.
70D--Objectives need to be specific to behavior outcomes and not just training outlines.
70E--Easy to get caught in a participant's game of distracting through argument, sidelines, etc.

71A--Concepts of adult learning or how do people learn.
71B--Failure to prepare.
71C--Presenting skills, (i.e., speaking, delivery style).
71D--Use of audio/visual aids.

72A--Feeling grounded in content--I sometimes felt I was speaking someone else's words.
72B--Developing a comfort level using audio/visuals (overhead projector, flip charts, etc).
72C--Presenting without notes.

73A--Overly concerned about meeting my agenda (i.e., subject matter, content, etc.) rather than the needs of the learners.
73B--Did too much lecture, not enough activities (learner-driven).

74A--Getting employees to attend.

75A--Fear.
75B--Managing hostile groups.
75C--Taking control of sidetracked discussion.
75D--Managing time.

76A--Being unsure of self.
76B--Lack of experience.
76C--Lack of organization.
76D--Too little or too much information.

77A--Relaxing.
77B--Participation is usually by a vocal few, not everyone--getting everyone involved.
77C--Using handouts--I have handouts for everyone participating, but not everyone uses them.
77D--I hit key areas in print and allow room for note taking.
77E--Staying "up" for a presentation.
77F--No good list of resources.
77G--Mixed group is also difficult--some new people, some "seasoned vets" makes it hard to address everyone and keep their interest.

78A--Connecting with the audience and not being self-conscious.
78B--Warming up the audience.
78C--Being authentic.
78D--Presenting someone else's material.

79A--Audience participation.
79B--Catching interest immediately.

80A--Lack of training aids.
80B--Adjusting to the level of understanding of the audience--8th to 9th grade level is necessary.
80C--Keeping the attention of the attendees.
80D--Not being able to reach or relate to some people.

81A--Were my objectives clearly defined?
81B--How do I keep the audience interested?
81C--What do I do to get students to interact and not just sit and listen.

82A--Lack of stand-up experience.
82B--Being flexible as audiences demand.
82C--Facilitation skills.
82D--Confidence.

83A--More concerned about doing well, rather than about participants.
83B--Determining amount of structure necessary for the group.

84A--Anxiety--too much talking.
84B--Cover too much too fast.

85A--Flexibility in changing approach when the first plan isn't working.
85B--Proper communication of training format (i.e., participatory versus lecture).

85C--Eliciting participation in short seminars.

86A--Where to find good training packages/resources.
86B--Where to observe good role models.
86C--How to determine the needs of the group.
86D--The debate between good training or good entertainment.

87A--Not having a concrete example for the group or trainee to practice with--theory without concrete examples is useless.
87B--Simulating unrealistic situations for skill practice (the farther from reality, the less enthusiasm it is received with).
87C--Not evaluating every trainee's efforts (that's what we want you to do; you get it, you don't; do it this way...watch one more time).
87D--Allowing them to leave without demonstrating mastery of the skill.

88A--Hardest part was learning to use exercises/activities that involve learner. It seems as if there was a tendency to research a subject to death and then prepare lecture notes.

89A--Identifying superior subject-matter experts.
89B--Talking experts into being presenters.
89C--Getting written materials prepared on time.
89D--Scheduling times and places.

90A--Poor skills: Monotone voice, said too much (too much one-way communication), lack of ability to facilitate questions and discussion; too many tangents/lose control-direction.
90B--High anxiety.

91A--Command of subject--you need to have complete knowledge and control over their subject prior to delivery.
91B--If any pieces are missing, you must take time to research, etc.

92A--Getting participants to participate.
92B--Too much material to cover in time allotted.
92C--Disruptive/deviant behavior.

93A--Handling training notes/guide--working from outline, etc.
93B--Figuring out how long something would take.
93C--Having questions to get discussion going.
93D--Fear about being able to answer questions.

94A--How to prepare material .
94B--How to prepare psychologically.
94C--Audience analysis.

95A--Reading the audience.
95B--Talking too fast/not asking if they had questions.
95C--Being nervous/not knowing the audience.
95D--Not keeping everyone's interest (keeping everyone involved).

96A--Talking too fast.
96B--Talking too much; didn't involve others enough.
96C--Did not always prepare, (i.e., agenda/support materials).
96D--Was not aware that I was a "Driving Expressive" and an ENTP and didn't flex as well to other styles.

97A--Side conversations.
97B--"Don't need to be there" attitude.
97C--Vast diversity of knowledge/experience level.

98A--Getting heavy duty diesel truck mechanics to trust a woman.
98B--Getting accustomed to "winging it" without the audio/visual tools necessary.

99A--Planning class--most effective use of time (lecture versus discussion; versus questions and answers).
99B--Generating participation.

100A--Dealing with participants who don't want to be in the workshop.
100B--Presentation skills/basic techniques.

101A--Comfort with audio/visual equipment.
101B--Knowledge of content areas (i.e., topics listed above).
101C--Awareness of advanced training techniques.
101D--Knowledge of training resources (videos, packaged training programs, books, etc).

102A--Mentoring relationship and feedback with other trainers.
102B--Pace of workshop.

103A--Fear/tension before presentation.
103B--Keeping the right pace for the group.
103C--Staying within time guidelines.
103D--Keeping fast-paced learners from becoming bored while you are attending to slower paced learners.

104A--Wondering if I had enough content to deliver.
104B--Used a leader's guide--sometimes I had to write out the entire script to ensure I wouldn't forget anything.

105A--Audience sometimes too small--made training awkward.
105B--Conveying sense of credibility to older audience.

106A--Fear of messing up and embarrassing myself.
106B--First-line supervisors who were resistant to change.

107A--Trying to figure what level of knowledge the trainees had so I didn't insult or baffle them.

109A--Did not know how to practice or prepare.
109B--Did not know how to anticipate responses.

109C--Did not have detailed outlines.
109D--Did not know knowledge level of participants on the subject.

110A--Moving too fast/too slow for audience.
110B--Giving class directions or class exercises.
110C--Making transitions from one point to the next.

111A--Asking effective questions to a group to encourage discussion.
111B--Being crisp and to the point in lectures.
111C--Being able to read a group to know if any game plans should be modified.
111D--At first I was more inclined to tell them what they should have learned versus asking them what they did learn--this was my most meaningful lesson.

112A--Establishing credibility.
112B--Handling dysfunctional trainees.
112C--Reducing "stage fright."

113A--Credibility, compared to audience.
113B--Being able to draw from limited past business experience.

114A--Putting the group at ease and getting them to open up early on in the course.
114B--Introduction of course (objectives/logistics, etc) seemed boring.

115A--Making strong connections between course content and on-the-job duties.
115B--We have a lot of last-minute cancellations.
115C--Personally had difficulty fielding questions.
115D--Had to use a lot of notes.

116A--Timing audience response time.
116B--Motivating discussions.
116C--Handling questions.
116D--Having too much material to cover for time allowed.

117A--Often, I tried to present more material than I had time for.
117B--I had difficulty obtaining training feedback from the group I was working with.
117C--In one presentation I did for our feed division the slide projector (provided by the coordinator) did not work.
117D--I presented programs that had been developed by other people without adequate time for preparation.

118A--Weeding out the "quality" training packages.
118B--Understanding what the follow-up requirements are.
118C--Thoroughly understanding the priority training needs of the client group.

119A--Stage fright.
119B--Organization skills.
119C--Managing problems/behaviors of students.

120A--I was interested in the subject; how could I get them interested?
120B--I'm self-taught; all skills came through scar tissue; I had no one to turn to.
120C--Using vocabulary and examples that my audience knew; not using mine.
120D--Dealing with the range of learning speeds in a class; what to do with the fast ones while pulling the slow ones.

121A--Lack of confidence in subject material made me less assertive.
121B--Timing--too much information or too little.
121C--Involving the participants and becoming a facilitator versus a lecturer.

121D--Effective needs analysis before program development or presentation.

122A--Because of my age (25) I was concerned that I would not be taken seriously; my credibility was often tested. Being prepared and knowledgeable about the subjects.
122B--I was concerned that I would run out of material to teach during a session.
122C--Let your personality come through your training.

123A--Pacing/timing.
123B--Flow of moving from one activity to another.
123C--Energy level; especially for multiple-day events.

124A--Confidence.
124B--Use of visual aids.
124C--Maintaining participant interest through use of creative training techniques.

124D--Listening to participants--ability to respond effectively to participants questions.
124E--How to involve the audience in a mostly lecture-seminar format.
124F--Preparation--how not to rely on use of notes for presentation.

125A--How to ask the audience questions.
125B--Did I have the room set up for the best delivery.
125C--Did I have the correct objectives.
125D--"Reading" the audience during delivery.

126A--Fear of group.
126B--Lack of group control.

127A--Learning how to ask questions that draw participation in group discussions from training participants.
127B--Remembering/learning that redirecting questions back to the group will generate discussion and create a more open atmosphere with training participants (not to mention they might receive a more practical and easily understood answer).
127C--Remaining flexible enough to feel comfortable deviating from the training design when discussions move away from the direction I wanted to take.

128A--Having good "war stories."
128B--Dealing with inadequate facilities.
128C--Keeping materials organized after use.

129A--Mandatory versus voluntary.
129B--Being able to continue to cycle the progress once running.

130A--Making concepts apply to specific jobs.
130B--Presenting concepts briefly and to the point.
130C--Keeping audience captivated on some uninteresting subjects.

131A--Getting everything done in the allotted time.
131B--Smoothly integrating activities and making transitions.
131C--Handling questions from older, experienced managers.

132A--Being relaxed at the beginning and getting their interest.
132B--Feeling knowledgeable enough about material to be able to relax and focus on delivering information effectively.
132C--Being able to adapt/react on the spot when I could see I needed to "redesign" to maximize effectiveness.

133A--Mastering new subject matter.
133B--Being flexible enough to allow participants to direct their own learning.

133C--Feeling that I had to know the answers.
133D--Being comfortable with silence.
133E--Matching tone and nonverbals to audience.

134A--Timing--running over.
134B--Facilitating role plays.
134C--Getting cooperation from consultants.
134D--Giving top managers bad news and critical feedback.

135A--Getting the people there on time.

136A--Practice, practice, practice.
136B--Making mistakes.

137A--Limited data research on supermarket training program.
137B--Poor human resource development in industry.

138A--Uncertain of credibility I had with audience.
138B--Logistical problems with off-site vendors and "no shows."
138C--Wandered away from prepared materials too often to prove I "know my stuff."
138D--Was too soft on expressing expected outcomes for participants.

139A--Not thoroughly understanding the specifics of the participants' jobs.
139B--Material too basic--participants more advanced.
139C--Ability to switch gears when an exercise wasn't working.
139D--Not enough group participation.

140A--Overcoming participants' fear of computers.
140B--Translating "tech-nese" into English.
140C--Ensuring learner understanding.
140D--Dealing with different skill levels of participants.

141A--Maintaining attention of audience.
141B--Developing a good flow/rhythm.
141C--Developing visuals.

142A--Learning scripted materials.
142B--Drawing out quiet participants in a workshop.
142C--Building an inventory of exercises and flip chart demonstrations that I could use as needed in a variety of workshops.

143A--Lack of confidence.
143B--Too narrow understanding.

144A--Keeping control of the time and audience.
144B--Handling "experts" in the audience.

145A--Getting audience to participate.

146A--Discerning accurate timetable for specific "modules," (e.g., how long would it take for a lecture or demonstration skill).
146B--Development of a needs assessment or survey was a real struggle.
146C--Discriminating between what was appropriate for handout material and what was appropriate as for use as overhead or lecture material only.

147A--Not being able to "read" my audience.
147B--Not listening to participants' issues.

148A--Line management commitment/coaching to the skills/knowledge that training make most key elements occur; would be willing to discuss or explain the benefits.

149A--Focusing more on my agenda, rather than the needs of the students.
149B--Not properly setting up the students for the presentation, assuming they knew where I was headed.

150A--Sensing when the group was not with me.
150B--Speaking slowly and calmly.
150C--Handling anger calmly.

151A--Adjusting the flow and tempo of delivery for each group.
151B--Too dependent on notes.
151C--Adapting exercises/simulations to a particular group.
151D--Continuously stopping irrelevant discussions.

152A--How to use an overhead effectively.
152B--How many words to include on transparencies.
152C--What color transparencies are most effective.
152D--How to control problem students.
152E--What do you say if you don't know the answer.
152F--How to deal with a variety of slow and fast students in the same class.

153A--Keeping the new employees' interests.
153B--Bringing information down to their level, (i.e. vocabulary, etc.).

154A--Checking with the audience to make sure I've been clear.

155A--Keeping focus on training material.
155B--Listening to audiences; being able to read their needs.

156A--Self-confidence that I knew the material well enough.

157A--Control of group--tuning into participants who are bored, interested, slower.
157B--Lack of knowledge with visuals--how to use overhead.
157C--Technical competence.

158A--Being challenged.
158B--People off on tangents.
158C--Trying to satisfy the participants' needs, yet continue to get across points of group.

159A--I did not know what I was doing was the "right" way.
159B--I needed support from others who trained in a nonprofit setting, which is very different from other situations.
159C--Training with no budget was hard too.

160A--Knowing the difference between too much information and not enough. I had a tendency to share too much background information.
160B--Gaining credibility with participants and myself. I was the "new kid" on the block, fresh out of college, trying to "teach old dogs new tricks."
160C--Making transitions from one topic to the next smoothly.

161A--Being "grounded" in information well enough to deviate from script to meet participant needs
161B--Self-confidence.
161C--"Finessing" training up in organization.
161D--Evening out expenditure of energy so I wasn't wiped out at the end of session.

162A--Credibility with participants.
162B--Learning how to handle the participants and material without sacrificing either.
162C--Writing the training materials/workshops.
162D--Developing a process for training.

163A--Recalling the right words to express what I want to say.

164A--Group dynamics--individuals with hidden agendas.
164B--Lack of participation.

165A--Keeping their attention.
165B--Question if they understand, (i.e., am I clear?).
165C--Organization of material, sequence.

166A--Truly understanding sound instructional strategies--why one sequence works and another doesn't.
166B--Lack of models for creative delivery--we know the lecture mode.
166C--Little or no practice before first session.
166D--No immediate feedback on style, understanding of material, understanding of group dynamics.

166E--Training is not mechanical. All trainers should be videotaped regularly, particularly in the beginning to see how effectively they can handle different people and different group sizes.

167A--Thinking on my feet.
167B--"Being myself" in front of a group.
167C--Handling harassment from trainees with more expertise on a given topic.
167D--Avoiding defensiveness.

168A--Distinguishing a training need from broader organization development issues.
168B--Credibility with supervisors and managers since I had not actually supervised.
168C--Meshing the right way with the organizational culture.

169A--Understanding of why employee is at the session--was it required? Does he or she understand the agenda objectives?
169B--Hesitation among employees to participate if they are in the same work group.

170A--Responding to difficult questions, challenges from students.
170B--Creating useful, relevant examples.

171A--Presentation skills.
171B--Moving people to action.

172A--Trying to cover too much information.
172B--Lecturing too much.
172C--Not being able to remember people's names.
172D--Trying to be clear and articulate. Using silence well.

173A--Difficulty meeting the needs of a diverse group of people who have varying skills and knowledge, (i.e., how flexible with course content should I be, and how do I know I am effective in changing content?).

174A--Being able to shift directions in order to come up with a different approach to help a group understand the material.
174B--Egocentric predicament--focus more on myself and my delivery than on the group.
174C--Putting the information being taught into my own words; internalizing it.

175A--Apprehensive about remembering materials.
175B--Apprehensive about appearing confident.
175C--Preparing a "too" detailed outline.
175D--Apprehensive about being able to answer questions.

175E--When co-facilitating, worrying that I would not appear as confident and professional as the other facilitator.
175F--Apprehensive that people would not like my style.
175G--Anxiety of standing in front of a group.
175H--Where to find material.
175I--How to effectively use audio/visual equipment.
175J--Apprehensive about making myself clear and making sure that the audience does not become confused or lost.

176A--Gaining credibility from the audience.
176B--Skeptical, outspoken audience--many engineers who had very different personalities from mine.
176C--I didn't have the confidence, background, or expertise to handle difficulties skillfully.
176D--Organizing my preparation and getting details of preparation down.

177A--Warming up the audience--learning how to have dynamic introductions!
177B--To get as much information about the audience as possible so that I could know and meet their needs.
177C--Having a great summary and conclusion. Learning to start with the conclusion and work backwards in building presentation.

178A--Appropriate use of humor.
178B--Hooking the audience's attention.
178C--How to start. Opening comments.

179A--Participant involvement--keeping interest.
179B--All necessary content is covered while maintaining flow.
179C--Providing adequate feedback on performance.
179D--Balance between maintaining control and manipulating learner.

180A--Not enough information on designing training programs.
180B--Familiarizing myself with program materials to prepare for sessions.
180C--Creative training techniques--coming up with new ideas.
180D--Making myself and program material credible.
180E--Knowing my audience and how to react to/answer questions or discuss issues that come up.

181A--Confidence in knowledge of subject matter.
181B--Maintaining control with a dominant participant.
181C--Drawing out a silent participant.
181D--The ability to use visual aids and maintain contact (or control) with the participants.
181E--Difficult to read class--understanding rate of delivery, necessary breaks, when to help someone outside of the class, not inside.

182A--Adapting training materials to audience.

183A--How to deal with a hostile, disruptive participant.
183B--How to bridge or address my lack of experience.
183C--How to support the company line and yet encourage participants to ask open questions.

184A--Building credibility.
184B--Ice breakers/keeping motivation.
184C--Enthusiasm during repetitive subject.
184D--Maintaining control during heated discussion.

185A--Long typewritten modules.
185B--Having volumes of information.
185C--Having enough experience in the field.

186A--Self-discipline (talk less).
186B--Stimulate group discussion, participation.

187A--Nervousness--what if I forget what to say?
187B--What if "they" don't like me?
187C--Will they be bored by this material, activity, training session?
187D--Does the training meet their needs?

188A--Modifying style to fit different types of audiences.
188B--Being ready for anything--cramped rooms, equipment that doesn't work, etc.
188C--Dealing with "jerks."

189A--Knowledge of techniques of training in conjunction with how adults learn.
189B--Make training job related--how can they use it in their jobs; Discuss how it can be used.
189C--Let participants know what is the purpose, process, and payoff for attending each session.
189D--Have support of management to reinforce new skills that are learned.

190A--Anticipating knowledge/skill level of trainers.
190B--Timing and flow of a one- to three-day workshop.
190C--Follow-up process one to six weeks after training.

191A--My credibility was questioned.
191B--Conflicts between personnel and training department; they always feel it's their job.

192A--Inattentiveness.
192B--Silent type.
192C--Nervous.
192D--Want to get at the job immediately.

193A--Specific business content knowledge, (i.e., delivering a communications course to an audience from a business that I'm new to).
193B--Not being able to anticipate where learners' perceptual blocks are/were as I proceeded through the instructional sequence.

194A--Trainee motivation.
194B--Weaning myself from notes.

195A--Connecting concepts to activities to avoid lecturing.
195B--Dealing with questions from participants.
195C--Giving instructions to participants on activities.
195D--Dealing with media (video, flip charts, overheads) and how to use it most effectively.
195E--Managing my own fear-- the first six months in training I didn't sleep the night before a program.

196A--During delivery phase, getting all the right people in the sessions (they had other priorities).
196B--Becoming quickly accepted into the existing culture/climate.
196C--Accepted delivery techniques sometimes didn't work, so finding out what would work quickly.

197A--Did not have enough time to plan/prepare.
197B--Extremes in base level of trainees.
197C--Time constraints--too much or too little time.
197D--Poor training materials (not enough time for development).
197E--Poor attitude of trainees (i.e., why am I here?).

198A--Keeping to the agenda--giving too much information; they couldn't learn it all.
198B--Being redundant.

199A--Using presentations, rather than actual instruction.

200A--Designing the training program so that it would teach and be appropriate for the length of time allotted. I would discover this problem during delivery--too much material or too little.

201A--Establishing myself as the leader or facilitator (too shy--slightly uncomfortable with knowledgeable people).
201B--Presenting materials that were written and developed by others--materials that did not fit with my own style or preferred methodology.

202A--Establishing credibility.
202B--Feeling relaxed in front of a group of strangers.

202C--Worrying that audio/visual equipment might fail or not work.

203A--Staying within time/pacing.
203B--Handling individual needs in group context.

204A--Lack of confidence--nervousness.
204B--Poor timing (never allowed enough time).
204C--Not relaxing and enjoying the audience.
204D--Fear of questions they would ask that I couldn't answer.

205A--Adults who didn't see training as necessary--a waste of money.
205B--Not getting the support from supervisors--no follow-up for participants.
205C--Changing people's thoughts and actions was very difficult.

206A--Being so wrapped in first time presenting and content that I couldn't pay enough atention to the participants.
206B--My boss was critical of the very things that participants wanted/needed and appreciated.
206C--Acceptance by some to the participants of the "new trainer's" credibility.

207A--Poor visual aids.

208A--Tendency to go beyond time allowed.
208B--Tendency to skim material to meet time requirements.
208C--Use lecture format versus workshop/facilitator.

209A--Credibility with plant staff (I had no direct plant experiences).
209B--Being accepted as a professional woman in predominantly male environment.

210A--"Train in a man's field"--they would think I didn't know the material. After a half day, they did have confidence.
210B--Getting technical training jobs.
210C--Getting out of direct technical training; I feel trapped not being able to expand into other training areas.
210D--Expecting too much just because trainers are adults.

211A--Slowing down, going with the pace of my audience.
211B--Having the information that would be the most valuable for my audience.

212A--Credibility--presented to people 10-20 years older than me.

213A--Responding appropriately to participants' questions/comments.
213B--Asking good (open-ended) questions.

213C--Learning it's OK to make a mistake--losing a train of thought or misspelling a word (on the flip chart).

214A--Timing--too much material for limited time span.
214B--More participation and less lecturing, but need to keep appropriateness of activity in mind.
214C--Necessity to teach a class several times to perfect content and delivery. Expectation that it will be all things to all people the first time is unrealistic. In that vein, remember to set clear expectations but even this is not a guarantee of obtaining results.

215A--Lack of professional critique, feedback, suggestions.
215B--Working alone in training.
215C--Selling my ideas so that I could deliver.

216A--Limited audio/visual equipment because of cost; health care facility couldn't afford an overhead.
216B--Internships are difficult to find; they do not last long enough and companies are too short-staffed (and their employees are overworked) to bother.
216C--Students in HRD usually are hired by personnel departments, rather than actual training departments.
216D--Finding the right entry-level job that matches your skills, especially when work experience is a couple of months. I would like to design a career plateau, but don't know where to begin.

217A--Soliciting participation from attendees.
217B--Handling objections.

218A--Stress led to a pace that was too fast, not allowing for enough participation.
218B--Trusted textbook examples too much and my own examples too little.

219A--Unexpected questions.
219B--Not enough time.
219C--Different expectation levels of trainees.
219D--Different experience levels of trainees.

220A--Lack of complete knowledge of software application.
220B--Incomplete or lack of good visual aids (handouts).
220C--Equipment problems and no back up plan.
220D--Training people who were 20+ years older than I and who had been in the business longer than I. I needed to prove my knowledge of subject.

221A--Concentrating on the material as well as being sensitive to group dynamics/needs.
221B--Nervousness.

221C--Not letting the group work enough. I was working too hard.
221D--How to handle problem group members.
221E--Group facilitating.

222A--Organizing all the memos/information that I receive.
222B--Keeping handouts updated.

223A--Dealing with participants who didn't want to be there.
223B--Dealing with participants from widely divergent backgrounds.

224A--Being flexible--"listening" to participants' real needs versus my need to get through an agenda.

225A--Confidence in my own ability.
225B--Thinking I had to know everything beforehand.
225C--Thinking I had to be entertaining.
225D--Thinking my audience was already knowledgeable on the subject matter.

226A--Timing.
226B--The proper use of visual aids and other collateral material.
226C--Audience feedback--where to start it and when to cut it off.

227A--Software not completed.
227B--Software not documented.
227C--Resistance to change from staff trainees.
227D--Lack of commitment of management for training.

228A--Nervousness--no formal training in presentation skills.
228B--Memory and focus--had to learn how to focus on content, rather than my self or my presentation style.
228C--Connecting with my audience/participants.
228D--In the beginning I was concerned about remembering all the details (e.g., making a good impression, wanting everyone to like me, etc.).

229A--Program positioning--how to make participants comfortable and and aware of program objectives.
229B--Media choices--what works on overheads, video, etc.
229C--How to develop or choose games that are effective and can measure performance criteria.

230A--Use of jargon not understood by trainees.
230B--My need for control led to a very serious tone--later as I became more familiar with other techniques, I eased up on control and tone became more informal.

231A--Presenting the material and feeling connected with the audience.
231B--Problem with voice tone becoming monotone.

232A--Dealing with problem attendees--resistance.
232B--Maintaining participant interest.

233A--Developing the training material.
233B--Understanding fully the company culture.
233C--Having a peer to work with and give feedback.
233D--Moving from teacher to facilitator.
233E--Lack of experience as a beginner.

234A--Trying to be the "expert."
234B--Talking too much.
234C--Lack of personal experience to draw on.
234D--Not being sensitive to the needs of my audience.

235A--Keeping adult learners interested in a great deal of technical, detailed information.
235B--Keeping materials updated. We are going through a rapid growth phase.

236A--Wasn't sure how to handle disinterested or disruptive participants.
236B--Prior to delivery, needed guidance in designing a needs assessment.
236C--How to use questioning to handle objections from the group.

237A--Confidence.
237B--Remembering without notes.
237C--Dealing with difficult people.
237D--Adding variety to keep energy and interest high (and for maximum interaction learning).

238A--When providing training of same type/similar content, difficult to restructure course content/objectives in such a manner as to accomplish learning objectives of management/supervisors yet make the course content of interest to class attendees.

239A--Balancing audience participation with my delivery and materials.

240A--Senior instructors taking control of the class.
240B--Learning how to teach with instead of at the participants.
240C--Using overheads as a crutch.
240D--Learning to use questioning to establish interactive training.

241A--How to control the butterflies in your stomach.
241B--Answering questions when you were not the expert.
241C--Keeping the class on track.

242A--Hesitancy of trainees to participate.
242B--More material to cover than time.
242C--Got off track in some discussions--became a gripe session.

243A--Unruly or talkative students (do not listen or talk over me).
243B--Passive, restrained students (do not respond to questions or share information).
243C--Trying to cram too much material into the time.
243D--My own nervousness (not being able to be myself and have fun).

244A--Finding exciting ways to present boring material.
244B--Trying to determine if a participant is comprehending the material, especially a shy, quiet person.

245A--Identifying means of verifying learning.
245B--Developing a variety of learning experiences.
245C--Developing curriculum to fit time constraints.

246A--Handling disruptive participants.
246B--"Facilitating" group process awareness.
246C--Maintaining enthusiasm.
246D--Evaluating training results.

247A--Not knowing how to focus on the learner.
247B--Not knowing how to work with the group or crowd.
247C--Not knowing how to make the material practical, immediately usable.

248A--Bringing the group back together promptly after break time.
248B--Quiet participants.
248C--Resistant or defensive participants.
248D--Establishing rapport and making people comfortable.

249A--Marketing the significance or credibility of the subject or myself.
249B--Time management of presentation.
249C--Trusting others to provide assistance with logistics (e.g., scheduling, audio/visual equipment).
249D--Knowing where the learner was "at," regarding his or her foundation for new learning.

250A--Keeping the group energized.
250B--Dealing with disruptive behaviors.
250C--Keeping the group focused.

250D--Keeping the group on time--making sure all material was covered.

251A--Politics.
251B--A lack of product-specific knowledge.
251C--A realistic job assignment (description of position).

252A--Management support.

253A--Understanding corporate culture.
253B--Move from academic setting to corporate setting.
253C--Coordination of small group with ongoing sessions.
253D--Getting into role play.

254A--Content mastery: Knowing it well enough to reduce dependency on notes.
254B--Adjusting delivery style to a wide variety of audiences.
254C--Sales people like a looser, more humorous, less structured delivery with more participation than do first-level supervisors or nonexempt workers; frontline people often need more encouragement to participate and are less willing to participate in role play.

255A--The need for developing a program flexible enough to change as needed to fit the learning skills and style of the trainee as they became apparent-- which takes not just one well put-together approach and sequence, but many options.
255B--Even with options already developed, sometimes it takes a lot of energy and commitment to drop what was initially started to try another option and still end up covering the material during the same time frame--I've had my most exciting, exhilarating, and fulfilling (and successful) session this way, as well as some humorous ones (and embarrassing).

256A--Having to refer to lecture notes.
256B--Lack of confidence in my ability (shaking first ten minutes).
256C--Keeping to a tight time schedule.
256D--Answering questions when unsure of content.

257A--Not knowing how to assess the needs of the learners in front of me.
257B--Not having enough anecdotal material for information.
257C--Being too bound into theory and models, not real enough.
257D--Always wanted to cover too much.

258A--Presenting information in concrete form, in examples, case studies, personal stories.
258B--Including creative strategies.
258C--Including too much information in too little time.

259A--Anxiety/stage fright.
259B--Wondering if I was really qualified.
259C--Defensiveness if the audience did not like/agree with what I said.
259D--Finding the balance between presentation and receptivity, theory and participation, and lecture and facilitation.

260A--Feeling confident about material, which is a preparation issue.
261A--Content examples.

262A--Not looking at the material from the learner's view.
262B--Being nervous.
262C--Being too focused on the agenda--not allowing enough time for people to understand the material.

263A--Setting a few important objectives and sticking to them.
263B--Matching level of material to readiness level of trainees.
263C--Finding constructive ways to involve trainees.
263D--Timing--estimating how long each segment of training would be.

264A--Too many levels of management in class.
264B--Lack top management commitment to class.
264C--Not efficient briefing of students.
264D--Students unclear of management commitment.

265A--How to develop credibility with existing work force.
265B--Was difficult to be creative. Had to use existing methods (slide shows, etc).

266A--Too much concentration on self--not learning for participants.
266B--Giving clear small-group discussion/exercise instructions.
266C--Developing easy-to-use worksheets and materials.
266D--Judging how long participant exercises took during class.
266E--Thinking that training was mostly content delivery.

267A--Not using enough specific organizational examples.
267B--Not enough focus on behavioral modeling with feedback.
267C--Overreliance on notes--uncomfortable with brief outline.
267D--Thorough knowledge of the organization--its values, philosophy, policies, procedures.

268A--Assuring the "buy-in" of participants early in course.
268B--Knowing the best seating arrangement for material.
268C--Fully understanding the dynamics of material in order to maximize it.

269A--Incorporating examples into class text to help participants to understand the product.
269B--Being expert in eyes of all male factory workers; establishing myself as expert while not putting class off at the same time.

270A--Integrating media.
270B--Identifying clear objectives.
270C--Feeling I had to be speaking at all times.

271A--Adjusting content on the spot.
271B--Being comfortable moving among the participants.

272A--I displayed nervous gestures (mannerisms with hands, feet).
272B--Understanding that participant involvement includes more than writing things down.
272C--I had difficulty identifying relevant participative learning experiences.
272D--I had trouble sequencing the events in a presentation in the most sensible, logical way.

273A--Varied experience levels of participants.
273B--Varied agendas and expectations.
273C--Disruptive participants or passive participants.
273D--First hand (setting stage, getting attention).
273E--Not comfortable with material (until you deliver it a few times).
273F--Nervousness at beginning of session; limited self-confidence.
273G--Not understand different learning styles.
273H--Reluctance to use discussion (possibly loss of control).
273I--How to re-direct discussions (nonrelated) with diplomacy.
273J--Time control.

274A--Maintaining self-confidence.
274B--Speaking fluently.
274C--Too much reliance on notes.
274D--Afraid of being asked a question I could not answer.

275A--Coping with unmotivated participants (those who were required to attend).
275B--Matching content to time available.
275C--Matching content to audience level.
275D--Developing effective transitions from topic to topic.

276A--Using flip chart correctly.

277A--Being so focused on trying to remember my material that I lost sight of what the folks in my classes needed from the session.

278A--Couldn't say no to an opportunity.
278B--Too much to do and not enough time.
278C--Tried to please everyone.

279A--Not being prepared enough; then being too prepared (surprise questions versus being too structured).
279B--Delivering as if reading a script; gaining enough confidence to only use notes.
279C--Not flexible enough--letting the timing control the content. Learning to recognize that with every group parts of the program may require more or less time.
279D--Handling questions--especially when I did not know the answer--how to re-direct and get the whole group involved.
279E--Breathing--channeling the nervousness into positive energy.
279F--So many administrative items--proper use of flip chart, overhead, handouts, grease board, room set-up, ice-breakers, etc.
279G--Recognizing the need to practice, to go beyond just thinking it through to doing it.
279H--Voice projection, how to use inflection; how to use body language.
279I--Dealing with group conflict and/or one sour person in the group; not preaching--instead, facilitating and leading.
279J--Use of humor.
279K--Going too fast--need to slow down, pause for air, listen.

280A--Meeting needs of wide range of skills and experience.
280B--Making modifications under time constraints.
280C--Involving all students in discussions.

281A--Organizing my material and feeling comfortable with it.
281B--Feeling comfortable presenting to group of business executives.
281C--Sustaining my self-esteem after making a mistake.

282A--Adapting pre-packaged materials to each group I trained.
282B--Wanting to include additional material; not certain about copyright or licensing infringement.
282C--Personal presentation--did I look like someone who knew what I was talking about.
282D--Handling a rowdy class; we need to know group dynamics and roll with punches.

283A-- Following the objective of training session--making sure that the participants understand the material.
283B--Keeping the information simple and interesting for the participants--not overloading them.
283C--Involving the participants in the presentation.

284A--Too much lecture--give burden of learning to individual.
284B--Relax.
284C--Handle specific student.

285A--Timing: Too much material for time allotted.
285B--Overheads: So interested in topic and participation of group, I would forget to turn off projector or I would cover materials that we weren't discussing.
285C--Moved too quickly: Portions of the program were rushed because I wanted to present the full design.

286A--Fielding ambiguous questions--no single correct answer.
286B--Getting feedback that learning really was taking place.
286C--Relinquishing control of the class--let others talk.

287A--Presentation skills/stand-up skills.
287B--Group skills.
287C--Process observations.
287D--Nervousness.

288A--Thinking I had to have all the answers.
288B--Pacing--allowing some sections to go longer than others, if necessary.
288C--Recognizing relative importance of different sections.
288D--Recognizing that it's OK to have fun too.

289A--Fear.
289B--Lack of familiarity with material.
289C--Excessive preparation time to offset the lack of familiarity with material.

290A--Understanding those parts of the business not directly related to my area of responsibility and how they related to my area (greater breadth of knowledge increases the trainer's credibility).
290B--Learning how to determine which questions were important to warrant full discussion versus which questions should be dealt with individually.
290C--To artfully defer the less important questions.

291A--Group not feeling comfortable.
291B--Not taking enough short breaks.
291C--Students looking bored.
291D--Be prepared at least one half hour before class time.

292A--Nervousness.
292B--Felt that I would not be credible because I had not worked in a plant environment.
292C--As a young woman I felt I didn't receive as much respect as a man, because the environment I work in is primarily male.

292D--As a woman, I am not trusted to deliver technical material--attitude that women can't be technically oriented.
292E--Lacked a commanding presence.

293A--Timing--finishing in allotted time.
293B--Diversity of participants and needs in public seminar.
293C--Spending sufficient time on sections of the program that required individualized attention.

294A--Not knowing how effective exercises would be.
294B--Security/nervousness about age.

295A--Not being too structured but still maintaining control.
295B--Getting participants to be responsible for their part of he program.
295C--Fielding questions properly.
295D--Representing company position on issues.
295E--Being a facilitator, rather than a presenter.

296A--Stage fright.
296B--Learning to involve trainees without giving the impression that the session was content free.

297A--Managing the length of discussions.
297B--Managing the participant who talks too much or strays from the topic.

298A--Lack of product knowledge.
298B--Lack of confidence to address experienced technicians.
298C--Don't understand how training fits in the organization.
298D--Didn't have the sense to look at training from the performance side.

299A--Getting effective feedback/evaluations of presentations.
299B--Effective use of visuals (i.e., reinforcement of ideas).

300A--Adjusting content to participants' needs and expectations.
300B--Involving the resistant participants.

300C--Having too much material for too short a time.

301A--Overwhelming stress in rehearsing program.
301B--Confidence decreased.
301C--Tried to memorize too much.

302A--Unfamiliar with corporate culture--no stories, no feel.
302B--Nervous.
302C--Can't gauge need for flexibility.

302D--Unsure of my manager's expectations.

303A--Getting through the first 5-10 minutes (nervousness).
303B--Learning to take cues from the audience about whether they were following content, were interested, needed a break, etc.
303C--Feeling OK about digressing from the topic to address needs and questions of audience.

304A--"Selling" senior management.
304B--Need to spend appropriate time in education sessions to develop understanding.

305A--How to cover content but make it interesting.
305B--How to motivate class members who did not want to be there.
305C--Lack of training on "how to train."

306A--Getting up to speed on management politics and history in order to sustain credibility.
306B--Having examples for materials.
306C--Know how much is enough information/background to have on a subject.

307A--Lack of experience about of questions that will be asked.
307B--Unfamiliar with games and ice breakers.
307C--Unfamiliar with material to be presented.

308A--Performance anxiety (stage fright).
308B--Feeling of not being as thorough with the subject as I would have liked.
308C--Sense of timing.
308D--Use of good group facilitation techniques.

309A--Reading the audience.
309B--Being relaxed.
309C--Being comfortable with material.

310A--Being polished regarding presenting the material.
310B--Being familiar with the material--if my heart is not completely in it I would prefer not teaching this class.

311A--Knowing the expectation of adults.
311B--Need to provide more visuals.

312A--Striking a balance between open discussion and losing control of time.
312B--Finding most efficient way to deliver handouts to participants.
312C--Feeling comfortable with ice breakers.
312D--Effective use of overheads, visual aids--was somewhat overwhelmed by how to produce them and how to use them.

313A--Difficulty in "reading" audiences.
313B--Lack of confidence.
313C--Little knowledge of group dynamics.

314A--Determining time required for the subject matter.
314B--"Butterflies."
314C--Talking too much.

315A--Managing the material, participants, and room logistics all at the same time.
315B--Staying fresh after doing the same program many times.

316A--Pacing.
316B--Responding to participant concerns beyond the curricula.
316C--Identifying, acknowledging, and dealing with resistance from the participants to the program.

317A--Not knowing how to get a group involved and talking.
317B--Not adequately trained in use of audio/visual materials--how, when, why.

318A--I was not very familiar with the products or the area; therefore, I had a hard time with my self-credibility.
318B--It was exhausting to me to meet new people at first; I used up too much energy--learning the best way to pace or use my energy.

319A--Handling negative participants and "know-it-alls."
319B--Taking questions as a threat because I should know everything if I'm the trainer."

320A--Understanding the ability levels of the learners before the training begins.

321A--Relating to the audience--using examples that were relevant.
321B--Making the theoretical "practical."
321C--Involving the audience--being confident enough to stray from script and go with what the audience was seeking versus worrying about covering everything I planned to cover.

322A--Bring together concepts and examples.
322B--Class participation.
322C--Understanding student needs.

323A--Self-confidence.
323B--Demonstrating leadership.
323C--Patience.

324A--Giving them much too much information.
324B--I didn't always listen to or access the "consciousness" of the group.
324C--I was eager to let them know what I knew and did establish rapport first and get them involved in learning.
324D--I love being on the platform; being nervous was not a barrier; so sometimes I would overwhelm and control my co-trainer and leave no room for him or her.

325A--Understanding business terms, language, etc.
325B--Having stories or examples from my experience that business people can relate to.
325C--Being seen as credible, because I had not been a business manager.
325D--Controlling the group; knowing when to let them talk and when to push on; other participants would be upset if a few dominated.

326A--Handling the wandering participant.
326B--Focusing a disruptive trainee.
326C--Gaining group participation.

327A--Mastering the subject matter.
327B--Being comfortable when delivering to more experienced managers.
327C--Handling questions and conflict.

328A--Coordination of visual aids, experiential activities, and didactic presentations.
328B--Needed more board space.
328C--Need more preparation time.

329A--Holding the interest of the students.

330A--Anticipating questions.
330B--Knowing the content thoroughly.
330C--Articulating solutions to abstract problems.
330D--Choosing the best delivery strategy.

331A--Not paying enough attention to level of audience sophistication/skill when designing the program.
331B--Unclear directions for participative exercises.
331C--Find balance between presentation of content and experiential opportunities.

332A--Credibility with audience--especially those who had been employed by the company for many years.
332B--Ability to speak from direct experience--examples to theory.
332C--Freedom from the script--ability to flow with the class.
332D--The ability to integrate different models or subject matter into the planned presentation.

332E--Getting over the feeling that I had to have all the answers.

333A--Building up self-confidence during the first program or two, especially regarding subject matter.
333B--Nuisance of logistical details in setting up room, equipment, etc., for program--not difficult, but time-consuming.

334A--Individualizing training--group needs are hard to meet; too many different areas to cover that do not pertain to all.
334B--Cannot be expert in all areas--must rely on outside expertise.

335A--Overcoming anxiety or stage fright.
335B--Learning how to pace content delivery with participant exercises.
335C--Coming up with examples to illustrate my points.
335D--Managing my personal ticks (i.e., fidgeting, using ahs, tendency to roam around the room).

336A--Having well-prepared visual materials (slides, overheads, etc.).
336B--Being realistic about how much can be covered in a session.
336C--Anxiety about allowing discussion and still covering the planned content.

337A--Always wonder how fast to pace the presentation.
337B--Anxiety over "ISTJ" (Introvert, Sensing, Thinking, Judging, as measured by the Myers Briggs exam) questions.
337C--How much material should I cover? How detailed should I get?

338A--Uncomfortable in front of group.

339A--Lacked confidence about my knowledge.
339B--Stage fright.
339C--Faced a very experienced audience.

340A--First five minutes--an ice breaker--a "grabber."
340B--Clear, concise content--not too much.
340C--A healthy variety to present content several ways.
340D--Know the audience (e.g., church versus business).
340E--Eye contact.
340F--Be careful with stories--be honest--if it happened to someone else, say so.
340G--Use humor and active listening.
340H--If you have a hostile person in training session, be gracious and thank them for being there.
340I--Have one-liners ready for talkers.

341A--How to develop (begin developing) program.
341B--How much practice does it involve.
341C--Changing program if prepared materials are not appropriate.
341D--Concentrating on effective delivery, instead of on personal appearance.

342A--Using an off-the-shelf training package and adapting it to a customized request.
342B--Using a training guide with instructions for the facilitator written in third person.

343A--Not enough time to both train and handle my other work because no one at the library is an actual trainer. Supervisors are expected to train new staff and fulfill their other duties at the same time.

344A--Planning the time limits for each unit or activity.

345A--Was I talking down to participants?
345B--How will information be reinforced back on the job?

346A--Time management.
346B--Not enough stand-up practice.

347A--Not enough clerical support.
347B--Too much material and not being able to judge discussion times.
347C--Giving frank feedback after a "blown" role play.

348A--Pacing the class with regard to various rates of learning.
348B--Trainees feeling overwhelmed by the material.
348C--Trainees feeling intimidated by the computer.

349A--Handling resistance--students not believing that information is applicable to their specific jobs.

350A--Balancing the "how tos" with the "whys."
350B--Finding trainers and training materials that I wanted to emulate--there are lots out there.
350C--Lacked full understanding of what trainees faced back on the job.

351A--Apprehension of doing something new.
351B--Angry clients.
351C--Other staff members would leave the room a mess, even after being asked to clean up.

352A--Nervousness at beginning.
352B--Opening.
352C--Conclusion.
352D--Organization.

353A--Concern that some of my audience may know my products better than I.
353B--Needed to appeal to a group that had different levels of knowledge and skills.

354A--Making the flow from one section to the next seem natural.
345B--Moving around, walking, and looking toward the group to invite participation and create energy.
354C--Becoming more animated.

355A--Identifying the exact needs of the participants.
355B--Allowing more involvement of participants.

356A--I made a lot of assumptions about my clients desire to learn and their knowledge. I learned not to assume and to ask a lot of questions.

357A--Too much detail planned.
357B--Didn't target audience's education level.
357C--Not enough student discovery taking place.
357D--Program, interaction too mechanical.

358A--Establishing credibility with long-term managers.
358B--Gaining commitment to training.
358C--Finding my own style of delivery and capitalizing on it.

359A--Selections of topics to add or drop.

360A--Knowing how to get started.
360B--Keeping on time.

361A--How to watch nonverbals; how to determine if the flow is correct, if the information is coming across.

362A--Avoiding the use of jargon.
362B--Practicing what I was preaching.
362C--Checking participants to see if they understand the materials.
362D--Handling questions without getting sidetracked.

363A--Training packages unavailable/new designing.
363B--Facilities inadequate--specifications unavailable (rooms, layout, ventilation, noise, lighting, seating).

364A--Audience expectations.
364B--Cultural difference of content to participants.
364C--Timing of training versus application back on the job.
364D--More experiential learning was required.

365A--Order of presentation of material.
365B--Anxiety (sometimes to the point of losing train of thought).

365C--Working with overhead projector--where to stand, how to point, how to write on transparency.

366A--Learning how to identify how different people absorb training (i.e., kinetic versus motion).
366B--Training older adults versus training younger adults.
366C--Not being afraid to let others know you don't know everything.
366D--Learning fear of training from others.

367A--Obtaining top-management approval of a comprehensive training program.
367B--Securing funds; a budget for training.
367C--Classrooms; training facilities.

368A--Overcoming the fear of "I'm a lot younger than they are!"
368B--Getting them to talk, becoming learner centered versus trainer centered.
368C--Handling the difficult participant/learner.
368D--Keeping the discussion positive when the company was being merged; people were scared.

369A--Learning the material in depth. The audience is very unforgiving of shallow knowledge or wasted time.

370A--Need to feel completely at ease with the material.
370B--Ability to adjust to the needs of the class.
370C--How to handle difficult cases or individuals with special needs.

371A--Getting individuals outside of academia to agree to self-development.
371B--Letting people know they make a difference in their own development.
371C--Initial interest in changing things.
371D--Actually changing participants' behavior over the long term.
371E--Lack of credibility because of information from the academic setting.

Appendix A: Group Synthesis

TOPICS AND GROUPS DETERMINED BY KJ METHOD OF SORTING DATA

Group A
Sandy Falkman, Cathy Sleezer, Dick Swanson

1. Difficult Learners
2. Making Adjustments on Stage
3. Involving the Learners
4. Timing the Lesson
5. Fear/Confidence
6. How to Question
7. Credibility
8. Organization/Work Examples
9. Diverse Learners
10. Trainee Readiness
11. Timing (Program)
12. Media/Materials/Facility
13. Use of Notes
14. Retaining Control of Group
15. Making Trainees Psychologically Comfortable

Group B
David Bjorkquist, Sue Damme

1. Insecurity
2. Subject Matter Knowledge
3. Teaching Methods
4. Motivation/Know Your Audience
5. Opening and Closing Skills
6. Timing and Organization
7. Problem People
8. Lack of Training Resources
9. Organizational Support
10. Addressing Organizational Needs

Group C
Deane Gradous, Barry Johansen

1. Supportive Environment
2. Questioning Design Process in Training
3. Questioning Training Design
4. Flexibility
5. Fear
6. Personal Experience
7. Ready the Audience
8. Audience/Trainee Involvement
9. Lecture
10. AV
11. Pacing
12. Self-Confidence
13. More Confidence
14. Subject Matter
15. Not Want to Be There
16. Behavioral Problems

Group D
Mark Lewis, Carol Nelson

1. Preparation
2. Visual Aids/Environment
3. Timing
4. Delivery
5. Audience Constraints
6. Personal Anxiety
7. Credibility
8. Organization Constraints
9. Organization Supports
10. Evaluation

Appendix A: Total Synthesis Matrix

Table 2

Total Synthesis Matrix

	A	B	C	D	**Problems Of Beginning Trainers**
1	5	1	5/12	6	Fear/Confidence/Anxiety
2	1	7	15/16	5	Behavior: Angry, Passive, Dominating Difficult Learner/Problem People
3	7	2	14	7	Credible/SME
4	4/11	6	11	3	Involving Learners In Training/Participation
5	3		8	4	Media/Materials/Facility
6	12		10	2	Timing/Pacing Delivery
7	8		6		Involving Learners In Training/ Participation
8	2	3	2/4	4	Redesign In Process/ Flexibility
9	6		13	4	Questions Reading The Audience
10	9/10	4	7	4/10	Formative Evaluation Readiness
11	15	5		4	Opening/Closing
12	12			4	Use Of Notes/Dependence On Them

Appendix B

Selection of Experts

CONTENTS

Correspondence to ASTD Officers 82

Correspondence to University of Minnesota Faculty 83

Nomination Form 84

Appendix B: Correspondence to ASTD Officers

February 6, 1989

Dear ASTD Officer:

This letter is a request for information for my research project which identifies delivery problems that new trainers experience. As a professional in the field of Human Resources and an officer of ASTD, you probably know personally many trainers who are experts in the delivery of training.

Please take just a few minutes to fill in as many names as you can on the attached list. I plan to use your list to help me identify eight to twelve experts who will report on specific techniques that they have found to be successful in handling typical delivery problems with adult learners in the workplace.

This research project is under the direction of Dr. Richard Swanson and will be published by the University's Training and Development Research Center. Because nothing under this topic has been published, we both belive that the result will be of great help to beginning trainers.

Please return your list to me in the enclosed, self-addressed, stamped envelope by February 17. Thank you for your assistance and cooperation with this project. Feel free to contact me at the telephone number listed above if you have any questions.

Sincerely,

Sandra Falkman
Research Assistant

Appendix B: Correspondence to University of Minnesota Faculty

February 4, 1989

Dear Faculty Member,

This letter is a request for your support for a research project which identifies delivery problems that new trainers experience. You probably know personally many trainers who are experts in the delivery of training. I need to find such people.

Please take just a few minutes to fill in as many names as you can on the attached list. I plan to use your list to help me identify eight to twelve experts who will report on specific techniques that they have found to be successful in handling typical delivery problems with adult learners in the workplace.

This research project is under the direction of Richard Swanson and will be published by the Training and Development Research Center. Because nothing under this topic has been published, we both believe that the result will be of great help to beginning trainers.

Please return your list to me in the enclosed, self-addressed envelope by February 15. Thank you very much for your assistance with this project.

Sincerely,

Sandra Falkman
Research Assistant

Appendix B: Nomination Form

NOMINATION FORM

Your Name____

Telephone____

Expert "Deliverers" of Training:

Name____________________ Title/Company____________________

Address____

Name____________________ Title/Company____________________

Address____

Name____________________ Title/Company____________________

Address____

Name____________________ Title/Company____________________

Address____

Name____________________ Title/Company____________________

Address____

Name____________________ Title/Company____________________

Address____

PLEASE RETURN TO:

Sandra Falkman
Training and Development Research Center
University of Minnesota
1954 Buford Avenue
St. Paul, MN 55108

Appendix C

Expert Responses

CONTENTS

Correspondence to Experts....87

Expert Questionnaires....88

Responses from Experts....91

Experts who Participated....116

Appendix C: Correspondence to Experts

Dear ______:

I am a research assistant at the University of Minnesota, working on a project through the Training and Development Research Center. The purpose of this project is to identify problems that novice trainers experience during the delivery phase of training and then to have expert trainers report on specific techniques which they use to handle these problems. This information will be analyzed and packaged in a useful way to help beginning trainers.

This research project is under the direction of Dr. Richard A. Swanson, and will be published by the Training and Development Research Center. Because little on this topic has been published, we both feel the results will be useful to novices in the field.

You have been nominated as an expert in the delivery of training. I received your name from a questionnaire that was sent to University of Minnesota faculty members and officers of the Southern Minnesota Chapter of the American Society of Training and Development. As an expert, I need your help in identifying specific techniques for handling training delivery problems. The survey results of 1098 problems experienced by beginners yielded 12 major training delivery problems.

Using the enclosed form, please describe in specific terms how you deal with these problems. Return the form to me in the enclosed, self-addressed envelope as soon as possible.

I value your expertise and I believe this project will be of significance. In the full report, you will be given credit as one of the selected experts serving this research effort. In addition, I will send you a copy of the final result. Thank you very much for your time and assistance.

Sincerely

Sandra K. Falkman
Research Assistant

Appendix C: Expert Questionnaire

EXPERT QUESTIONNAIRE

Your Name________________________Telephone________________________

Company Name____

As an expert trainer, how do **you** respond to the following training delivery problems that most beginning trainers experience? Please be specific, and feel free to respond on additional paper if necessary.

1. How do you handle **fear**? Beginning trainers have a lack of confidence (or anxiety) which is experienced during the delivery of training.

2. How do you handle **credibility**? Beginning trainers perceive that they do not have credibility with the learners as a subject matter expert.

3. How do you handle **personal experiences**? Beginning trainers lack personal experiences or stories to incorporate into the training that relate to a specific organization or subject matter.

4. How do you handle **difficult learners**? Beginning trainers have trouble knowing how to handle the trainee who presents a behavior problem. This may include people who are angry, passive, or dominating.

5. How do you handle **participation**? Beginning trainers have trouble involving the learners and getting people to participate.

6. How do you handle **timing**? Beginning trainers have trouble with timing or pacing the training so as not to rush through the material. There is also a concern of having too much or too little material.

7. How do you **adjust instruction**? Beginning trainers find it difficult to adjust training to the needs of the learners, as well as being able to redesign the presentation during delivery.

8. How do you handle **questions**? Beginning trainers have difficulty effectively using the questioning technique, as well as being able to respond to difficult or unanswerable questions.

9. How do you handle **feedback**? Beginning trainers are unable to read the trainees in order to make adjustments and use formative evaluations effectively.

10. How do you handle **media, materials, and facilities**? Beginning trainers are concerned about how to use media and materials effectively, as well as how to take care of breakdowns that occur in these areas.

11. How do you handle **openings and closings**? Beginning trainers need techniques to use as ice-breakers and introductions, as well as effective summaries and closings.

12. How do you handle **dependency on notes**? The problem is determining specific ways of presenting information without feeling dependent on notes.

Return address:

Sandra K. Falkman, Research Assistant
Training and Development Research Center
1954 Buford Avenue
St. Paul, MN 55108
(612) 624-1296

Appendix C: Experts' Responses to Training Problems

EXPERTS RESPONSES TO TRAINING PROBLEMS

FEAR

1. Preparation--Be certain that you know and understand the material. Watch someone else deliver the same program, if possible. Don't work alone; there is safety in numbers. Talk through the material out loud, and I play, "What's the worst possible thing that could happen?" game.

2. (a) Know material 100%; (b) Practice alone; (c) Practice with peer feedback; (d) Use a limited amount of new material with other proven material.

3. Stay up late the night before a presentation. Then you are too tired to let fear distract or agitate your thoughts.

4. I experience lack of confidence (anxiety) during the first 5-10 minutes of my workshops. I have developed a very strong, powerful opening that wakes up my audience, gives me credibility and develops a sense of need for the training in each participant. I also memorize and practice the first five minutes.

5. Discuss with the trainers that this is a normal reaction. Brainstorm ways they can connect with the group through ice breakers and introductions and encourage them to present or train many times to increase the comfort.

6. (a) By being exceptionally well prepared; (b) Reminding myself I know (or at least probably know) more about the topic that they do.

c. Starting a session with an activity that gets trainees talking and involved.

7. Be prepared! By having a complete lesson or training plan with well-developed objectives. Practice any new presentation (sometimes with an audio tape recorder for playback), review any that I have given before.

8. Learn to direct it into positive energy...its natural response. I just think of my "ideals" in terms of delivery and emulate.

9. (a) Preparation--I have a detailed lesson plan. I practice the parts I present out loud several times. It really helps to have the first few sentences very well planned. That way you do not have to find the right words when you are the most nervous. Also, I always go to the classroom ahead of time to make sure everything is set up. (b) Meeting the participants--one

advantage of getting to the classroom early is to meet the participants. It is less intimidating to teach a group I have met. (c) Check it out--If things are not going well during the class, I ask them to stop and we do a process check.

10. Part of my routine in the hours and minutes prior to the start of a seminar is to spend time doing some relaxation exercises, some T'ai Chi exercises, and some prayer. In the ten minutes prior to starting a seminar I experience a "getting started" anxiety, noticeable as underarm perspiration. Once I get started and get "rolling" that phenomenon disappears.

11. I overprepare and overorganize. I arrive early to get comfortable with the surroundings. I begin with an activity that gets the group involved and focuses attention on them, not me. I return my thoughts to what the learners need. I always act like myself so I don't have to keep up a training persona.

12. (a) Overlearning; knowing the material better than the trainees ever will or will need to. (b) 3-5 years of Toastmasters speaking before presuming to stand before a group.

13. (a) Visualization of myself doing well. (b) Rational self-talk (per Albert Ellis) logically defining my expertise and preparation.

14. By preparation: Materials and practicing speaking loudly at least at the beginning of a presentation either alone or in front of other people or video.

15. More preparation: Develop a beginning that I am very confident about. Usually refer to flip chart right away so that I can move around; early audience involvement; visualization/relaxation exercises.

16. (a)Butterflies are a good thing--just go in. (b) If really afraid, confront what you are afraid of--ornery group, fielding questions, etc. If anxious, figure out what you are anxious about (a laundry list). Fear has an object; once it is discovered, you can take steps to handle it.

17. (a)I find that if I memorize my "opening lines" that I loosen up a little. (b) Being very prepared. Even if I've done a program before, I always go through my lesson plan and rewrite it.

18. (a)I acknowledge fear to myself; sometimes I acknowledge my anxiousness to my audience. (b) I "act as if" my audience loves and respects me. This is a powerful attitude tool.

19. (a) Relaxation and stress-reduction exercises (e.g., deep breathing, meditation, reframing the situation--What's the worst that could happen? Can I deal with that?) (b) Mental rehearsal of whole program and action rehearsal of first 10 to

20 minutes to feel polished. (c) Publicly acknowledge fear and relate to content or progress of day.

20. Preparation helps eliminate fear, and once I have mastered the content, I can focus on delivery. Dress rehearsal--walking through and mentally and physically practicing all elements of the presentation can also minimize fear.

CREDIBILITY

1. I don't. If you even raise the credibility issue, you in effect, reinforce the issue. I take the position that I am the expert by virtue of being the trainer. When challenged, I don't respond directly, but try to use the challenger as a resource.

2. (a)If I am prepared credibility will come, (b) Always look sharp and be well organized.

3. If not an Subject Matter Expert--ask lots of questions and reinforce contributions. If an SME--don't hesitate to announce the scope and breadth of your skills and experience. Then, cut it off when they look bored.

4. I cite third-party references, research reports, quotes, newspaper articles, etc. that pertain to the subject. Anything to create the perception that I have done my homework on the subject. I also relate stories of how I personally have benefited from the subject matter. When I was a beginner, I created the stories, because I had not experienced them yet.

5. Suggest that they do not talk about their lack of knowledge. The odds are high they know more than the learners. Encourage them to use personal experiences that show their knowledge of the subject matter. Credibility issues are usually in the head of the trainer.

6. (a)Outline my experience on the topic, (b) Tell them I don't consider myself the "guru" of (topic)--that I've learned some things along the way which may be helpful, (c) (If appropriate) point out that their experience with the topic will be valuable input.

7. Do not apologize or admit lack of credibility. Someone selected or appointed you because they felt you had credibility--proceed as if you do.

8. Immerse yourself into the Subject Matter Expert's world. Listen, observe, apply what you know to what they know.

9. (a)Introduction--It helps to introduce yourself. Incorporate your relevant credentials into the introduction. If you do not have any, use the credentials of the organization you represent (e.g., the training department has successfully delivered this course

for the last 6 years). Acknowledge the content experts who put the course together. (b) It's OK to let people know this is the first time you have taught the program, as long as you are prepared. Ask for their feedback as you go along to make sure the class is meeting their needs.

10. I diffuse credibility by positioning the participants as the experts. I once conducted a supervisory seminar in which the participants had 438 years of supervisory experience. I had five (5). I used their experience, rather than mine--that was my credibility.

11. I remind myself that I have expertise in training and facilitation and that the group will have whatever additional expertise is needed. Most training topics can be seen as relating to problems. With a problem/audience focus one need not be the expert. I NEVER train in areas for which I do not develop at least some expertise.

12. (a)Explain the limits of your charge: "I know the xyz widget inside and out, but I don't claim expertise on the entire product line."
    (b)Use personal experiences during the training.

13. Talk about my background, variety of experiences. Also talk about background of theories/other content elements that are components of training.

14. To make sure that the learners understand that their expertise is different from that one of the trainer. That training field is another expertise. To respect the learners for their expertise and use it.

15. (a)Translate past experience (volunteer, waitress work, being a mother) into skills and experiences which you can refer to without stating specifically where they were. (b) Practice for confidence (videotape self; get critique from others).

16. My job is to deal with information. Tell the trainees that they may have questions that you cannot answer. Be up front about where you stand with the subject matter--an expert or a conduit. Let people know what your expertise and experience is. Talk about training, experiences, and what you know or don't know.

17. Before I teach a new subject, I try to immerse myself in it. I may not know everything about the particular topic but I want to know at least one concept/critical issue cold.

18. I honestly acknowledge my limited experience and appeal to their expertise and emphasize that we each bring valuable experience and knowledge to the learning event.

19. (a) Study, study, study and talk with experts: Then cite sources. (b) If group has experience, structure session so that their expertise is tapped first--define training role as "kickoff specialist" and summarizer. (c) Don't teach completely outside your expertise. (d) Team up with more credible trainer. (e) It's OK to acknowledge that I teach in order to learn.

20. When I was 22, I conducted training programs for experienced people in their 30s and 40s. I realized my credibility was given me by my company. They had the belief that I was worthy to conduct programs they had carefully researched and developed. Their reputation was my reputation. They loaned it to me. Also being the trainer doesn't mean you need to know more than everyone. You facilitate this acquisition of skills and knowledge.

PERSONAL EXPERIENCES

1. This is a great problem and frankly I don't have the answer. If the trainer attempts to use stories that place him or her as inexperienced (i.e., "I remember one time in my philosophy class,") he or she will lose credibility. It argues that trainers must have some experiences to be effective.

2. No response

3. Everyone has personal experiences. If you don't, ask participants about theirs.

4. See above. The only time a trainer does not have personal experiences with the subject matter is during the FIRST workshop. After that, the trainer can say, "Last week when I was working with an engineering team in a workshop . . ." and relate an experience that proves a point. During my first workshops, I have made up personal experiences to make a point.

5. Everyone can think of experiences--it just may take more memory recall. The key here is to ask probing questions.

6. (a)If I don't have personal experience, I try to gather some anecdotal comments before the session. (b) Just say "I don't have . . . Can anyone share an experience?"

7. Relate experiences of others in the field. Tell how others have faced this problem and how they solved them.

8. Steal.

9. Use examples from the literature or from interviews with people. Of course, it is always good to ask the class about their experiences.

10. I look for approximate experiences. Each time I conduct a new seminar I look at my life experiences for approximate

experiences. I can usually find them. When my experience fails me, I look for third parties I can talk about.

11. I prepare in advance by interviewing people from the organization. I use their experiences to illustrate points. I know stories about the experiences of others. I spend some time getting mini-experiences. I rely on the learners for their experiences and use those.

12. (a)Tell other people's stories--with accreditation. (b) Ask trainees for their related personal experiences.

13. I ask participants to come up with critical incidents and either I "collect" them (verbally) for later use, or I ask them to discuss these examples with other participants.

14. I use the stories of more experienced trainers or stories I learned from readings.

15. Look at # 15 above (using generic experiences). Read anecdotes and cite others' (authority's) experiences.

16. People only think they don't have experiences. They may not have stories. At key points, force them to think about similar things. Hone down to stories that will carry in the classroom. Need to tell them a few times. Think of movies, stories, famous relationships. Create analogies. What are the key points, the junctures. Relate own life experiences early in training. Become vulnerable; others will share then. "Kid" stories are great. People can always come up with something.

17. (a) Solicit examples from other trainers or from target audiences before training and use those, citing the source. (b) Ask for examples from participants in workshop.

18. Use whatever anecdotes I can find.

19. (a) Facilitate to control audience sharing--ask for examples, design small group for one on one exercises with quick summary back to the whole group. (b) Share the experience or vicarious experience and test for helpfulness.

20 Almost all of us have a little experience to share--share it, then borrow the rest. I related things that had happened to others--crediting them. I searched out people in the organization who had experience, learned their stories, and shared these stories with others. Showing you've done your homework also builds credibility.

DIFFICULT LEARNERS

1. I have a variety of methods from confrontation (on a break) to using the group, to ignoring the behavior. It really depends upon how much it may interfere with the process of the group. The most important step is to analyze the reason for the behavior and deal with that.

2. No response.

3. For severe problems. At the next break, call the person aside. Describe the behavior, state its effects, and ask for the person's help (leave or cooperate). Continued problems--Tell them you have scheduled them for the next session and request they leave the current session.

4. There is much written on this subject. Too little space to go into--each type of difficult learner needs a different approach. For instance, I would handle a dominating learner different from a passive one. I have even, on occasion, asked a participant to leave the class based on their disruptive behavior. My most frequent method is to talk with the person during a break and confront them.

5. This is not my greatest strength. Many times the class will deal with the angry or dominating learners. Usually I suggest paraphrasing the issue so you demonstrate that you listened and ask to talk with them in more detail at the break. Contract with the group to move on.

6. Address it during the session ("you seem to . . .") or during a break. Ask for the person's help and try to get them to see the problem from your shoes.

7. BE POLITE. Move on. Then be direct. Their concern is not in line with topic or beyond your control. Often state that is something that the group will be able to solve.

8. Humor.

9. (a)Try to circumvent the dominating learner--for example if they talk too much, direct the question to the more quiet person in the class, avoid eye contact, structure exercises where wide range of participation is encouraged. (b) Don't focus on the angry person. As a new instructor, I would always focus on the least engaged person or the most angry person, and it would throw me off. Perhaps talking to the person during break to have them vent their anger a little will help. (c) The design of the class should include exercises that will encourage learner involvement. Talking to these people during break helps too. See how they are feeling about the course. Avoid putting them on the spot and do not direct too many questions their way.

10. I generally check with these circumstances at a break, lunch, or at day's end. I will often check with other participants to determine if the perceived disruptive behavior is dysfunctional for people in the group. When it is disruptive, I will discretely confront the individual at a break, describe the observed behavior, express my perception of how it is affecting the other people and ask how we con reconcile the problem.

11. Sometimes not very well (that's why we ALL can cite examples of difficult learners). I will generally talk to the person individually at a break ASAP! I make the dominator an observer in activities. I call on the passive learner. I try to find out what's bothering the angry person.

12. No response.

13. Angry: I ask others for "answers" to their question (e.g., "What do you think," directed to rest of class).

14. My method includes talking to them after class and being honest with them. Try to find out how to motivate them. Ask them how they can contribute to the success of the class.

15. Make a personal connection--stand near them. Ask them "how it's going." If interruptive, active listen/paraphrase. Use the phrase, "Be that as it may . . ."

16. Dominating: Break eye contact. Stand with back to them. Say, "I want to hear from some other people." Angry or confrontive person: Attack or challenge mode. Answer the question. If they are playing fair, that will suffice. If the agenda is to make trouble, ask the person if there's something going on here. They must declare yes or no ("Do you have a chip on your shoulder"). They must declare themselves. May have to ask the person to leave.

17. Soliciting help from rest of participants if trainee is argumentative (e.g., paraphrasing the issue being debated and asking for their opinions). Passive participants: I try to catch at break and see what the problem is.

18. (a) I try to draw out resentful or defiant participants by asking them, "Where would you rather be right now?" (b) I will ask those who dominate to hold back. This must be done carefully and in private, if possible.

19. (a)Use nonverbal communication--move closer physically, change eye contact, etc. (b) Remind group and individuals about ground rules of mutual respect and balancing needs of group with needs of individuals--offer to talk to individual during a break. (c) For passive, invite comments (gatekeeping) and reinforce helpfulness of comments when relevant--ground rule of participation, at least in head.

20. I use instructor-led, participant-centered training. Having trainees in groups of five to seven makes learners accountable to others. When directing questions I ask small groups to discuss responses and feedback. Five to seven is large enough to empower the group to deal with domineering people, small enough so the passive participants do not get lost. Shifting leadership within the group is also helpful.

PARTICIPATION

1. Good design! If you have early activities that cause people to lose their inhibitions and gain some trust with the other people in the class, usually most people participate. Some individual coaching helps.

2. (a)Make an effort to call on people. (b) Use "phased participation." Have each person answer questions alone, then in small groups, then in class setting.

3. Ask questions. Conduct small-group activities where they can interact with their peers.

4. (a)Asking only OPEN-ENDED questions. (b) Consciously provide POSITIVE feedback when someone participates.

5. I encourage them to put people into small groups for short discussions. This usually helps to make everyone comfortable and warms them up.

6. (a)Tell them up front that you want them to participate. (b) Have specific questions ready to ask.

7. Write interaction items in advance and use them if trainers are not participating.

8. Warm the group up. Reduce the fear.

9. (a)Carefully structure the questions so they are open-ended. Write several questions into the lesson plan. (b) Have people talk at the beginning of the class (e.g., introducing themselves, their objectives for the course). It breaks the ice. (c) Use a variety of ways to get people to participate--such as small groups, dyads, and individual exercises. Many people are not comfortable talking in front of the whole class.

10. The participation is clarified at the outset of the seminar. I announce that I expect everyone to participate at the level at which they are comfortable. I also ask each person to write an objective for attending. Those objectives are posted on a flip chart and reviewed at the end of the session. I also empower each person with the responsibility to achieve that objective.

11. Plan! Plan! Plan! Structure! Structure! Structure! I use involvement for a purpose and design the learning activities that are necessary to achieve that purpose. I set the expectation by having them participate immediately, at the beginning.

12. (a) Structured exercises. (b) "Elicited" summarizers.

13. We build lots of exercises/case studies/roleplays into the training. Also use groups of two or three for small group discussion. It's very important to be quite specific with directions, or these become small talk.

14. I start group work right away (e.g., their expectations, their position, etc.). When they enter the room I DO NOT IGNORE them, I greet them, I talk to them. I immediately let them participate. Each team would present on the above (expectations).

15. Write down questions--imagine you are the audience. Make the questions easy to answer. Often participants don't respond if questions are too complex.

16. Ask a question. Have people write down the answer. Then ask someone to share. This opens things up. One half of the population is assertive, the other half isn't. Always try to see who is assertive. You can then call on people. Some people tend to "get fixed" (This also works for passive participants--see question # 4). Ask people why they are here. Tell them that whatever is your agenda, is your agenda and that while they are here that this is what you are asking them to do. Make it their responsibility.

17. Using a variety of participation methods (e.g., possible questions to trainees that are sure to provoke answers, structured small groups, meaningful exercises). Beginning trainers rely too much on "any questions."

18. (a) I almost always ask participants to share in dyads. In this way, everyone is expected to share with relatively low risk. (b) I then build to large group participation.

19. (a) Ask, wait (don't fill silence), listen, integrate. (b) Divide and conquer--design small-group exercises and reports to the group. (c) Keep my reference to their common background--not my interpretation without checking for accuracy.

20. In addition to response for question above (response #20), I use printed projects that small groups work through. When finished, the groups share their findings with other groups. Also early in the training I reinforce the idea that with risk goes reward, and I reward people for volunteering and participating.

TIMING

1. I usually plan too much material and have some pieces that I consider expendable. I concentrate on the core materials and skill acquisition, then if I have to, I can always leave out the parts that only supplement. I also plan ahead, monitor the time as the event continues, and redesign in a hurry if necessary.

2. This will come from sound preparation . . . with "changes" coming over time.

3. Training problems relate directly to too much content for the time frame. Cut the amount in half by removing unnecessary detail.

4. Too much material: Before the workshop, I write down the timing sequences by the hour for each day on a single sheet of paper and keep it visible during the entire workshop. Example:

    8:00a.m.--Introduction, ice breaker
    9:00a.m.--Situation analysis steps
    10:00a.m.--Team breakouts, practice, etc.

    Too little material: For each module, I have 2-3 extra topics. Each one is 10-15 minutes long. This material is "nice to know," but not mandatory to understanding the key points. If I have extra time, I cover it, but only if my audience is "with me." If it is 3:45 p.m. and the workshop ends at 4:30 p.m., I will often close the session if all the key material is covered. This rewards the class for being quick learners, and they are anxious to come back the next day.

5. In the design, flag areas that either can be covered faster or need more time. If the handouts are complete, you can sometimes cover an area faster. Identify the "need to know" versus "nice to know" subjects.

6. Set a schedule for each section. Plan for the content that is REQUIRED (must cover) and also some DESIRED (if time permits). Make sure there's a clock in the training room.

7. Practice--Know where you should be at 15-minute intervals. Use handouts if you run short of time and extend your introduction if you have more time.

8. Practice . . .

9. (a) Practice ahead of time--so you are familiar with the materials. If you tend to rush, write notes to yourself to "slow down" and "enunciate." (b) Time every component of the design. (c) If you are over, negotiate with the class on how they would like to proceed. They can decide if you should skip something, go over something or speed things up. (d) Often, I have extra questions or activities to use if we are left with lots of time.

10. Timing is not important at all! Learning and meeting the performance objective is the important stuff. I will take the time to ensure that people learn what they need. Often, I find when I focus on learning, time is not an issue.

11. When in doubt, cut it out. Mix activities and presentation. Design in a modular fashion such that an entire section can be eliminated, if necessary. More time can be allocated to activities if presentation is the problem. Or (heresy), end early if you are done. The biggest problem is too much material. "In five years, what would I want this group to know/do?" Then I pare down to those three or four main points/skills.

12. (a) Better too much than too little! (b) Some value-added material for last. (c) Same with strictly procedural information.

13. Have a trusted peer watch and comment after training is completed. Videotape it. Watch another trainer handle the same material.

14. I am experienced enough to play it by ear. I adjust to the learners and their needs. For the beginning trainer I recommend very careful planning on how much time for each topic. From that the amount of material can be planned.

15. Contingency plans. For example, If I'm up to this point by 10:30 a.m., I'll include this exercise; if not, I'll scrap the exercise. Prioritize activities. Always leave room for closure.

16. Get a sense of teaching something through experience. Tell people where you are, "I'm a little behind of where I want to be . . . ." Experienced teacher can judge better. That which makes logical sense in design may be boring. Look at the energy flow. Pace with variety.

17. I have very detailed, lesson plans. Also, I diplomatically cut off questions if they are running too long by suggesting that people submit the questions in writing; then I can group similar questions and respond more efficiently.

18. (a) I am more comfortable when I have more material than I will need; then I encourage group participation and involvement. (b) I watch body language for signs of restlessness, boredom, or waning interest.

19. (a) Establish ground rule where learners accept role of giving ongoing feedback on pace and timing (often related to volume of material). (b) Estimate timing of program and build in contingency plans (i.e., what to skip, additional material to add).

20. I ask myself and others "what do people need to know/do when the training's over?" I place more emphasis on know/do and make sure there are printed resources available. I also divide content into 20-minute increments (the maximum span for understanding without a change of pace) and use this to keep myself on track.

ADJUST INSTRUCTION

1. This is tough to do and is one reason I like to work with a partner. One trainer can reevaluate the training while the other is working. One person can start redesign while the other continues. You have to be flexible and have alternatives in mind before you begin. You "wargame."

2. No response.

3. Take frequent, short breaks. While they eat, you review, plan, and organize the next segment (60-90 minutes).

4. I check with my participants EVERY break to discuss if the presentation is too fast, too slow, etc. If the presentation is well-prepared and researched there should rarely be a need to re-design it during delivery. This is often a disaster. I do not re-design midstream. I may drop some segments, but never rewrite. During breaks, I ask participants questions that give me feedback about their needs for the next module. I expand or contract accordingly.

5. Think about alternatives ahead of time. Don't try to re-design on your feet. Can put learners into a short exercise or discussion and then re-design while they are working.

6. Ask for feedback from trainees periodically ("How are you doing? "This is what I have planned." "What do you suggest?")

7. Find out beforehand as much as you can about the learners. If feedback during session indicates changes, make them carefully.

8. Include activities for people to do--while they're doing them--use the time to regroup!

9. (a)If you are teaching adults and are seeing indications of their discomfort or boredom--in most instances you can ask what they want.

10. Adjusting instruction requires measuring results during the instructional process by observing practice activities, asking questions and administering performance tests. When I determine that what I am doing is not working, I do something else. I once threw out the agenda for a five-day seminar on the third morning (because it wasn't right for those people). I then asked the participants to map did what they needed; I would be their tour guide. We structured a process and activities to meet their needs and concluded a successful seminar on Friday.

11. Have a "Plan B" and a "Plan C." Find out the needs of learners EARLY during training. Modular design (see Timing, #11). Use activities that allow learners to introduce their own needs into their work. Allow lots of Q and A time.

12. Shaping, cueing, response reinforcement, etc.

13. I try to build either/or "branch points" into training--remind myself to explore what will be most beneficial for the group at this point.

14. It is difficult to adjust and still achieve objectives. I try to concentrate and "read" participants well. During delivery I go back to the objectives with the participants and together we decide on where we are going. Also, I watch time planned and spent on topics. If I devote more time on a topic, then I cut short another one.

15. (a) Ask for ongoing feedback--formally and informally (on breaks or with the whole class). (b) Use contingency plans.

16. If you go full blast ahead and do it all--machine-like--you may get into trouble. Rather, have check points. Anticipate questions people have. Start building a repertoire of responses. Discussion may take a tangent. If learning goes on: (1) Look at the time. (2) Decide how it relates to what you have to say. "It's been 10 minutes. We're on a tangent. Do you want to continue?" Turn it back to them. Link it back to the point you were trying to make.

17. I usually have a couple of alternative approaches in my "hip pocket" that I can pull out if needed. I also shuffle agenda sometimes (i.e., change order).

18. This requires courage and risk. I have learned to "trust the process," which means I value group process and trust my intuitive sense about what adjustments are needed.

19. (a) Ask audience to choose between two options/ask what they want. (b) Keep imagining yourself as a participant.

20. Periodically, I ask small groups to generate 2-3 questions they'd like to ask about anything covered in the last module an/or previous modules. I gave them 3-5 minutes to develop questions. I then move from group to group taking a question from each. If a particular area generates a lot of questions I know the area needs expanded treatment. I also ask participants about application. If they can't figure out how to use something that also gives me clues to modifying to meet their needs.

QUESTIONS

1. The biggest rule in group training situations: Never answer a question until the group has had a chance to answer it first. However, you have to be careful. If the group perceives that you are avoiding a question you may have problems. Unanswerable--easy! "I don't know."

2. No response

3. Ask direct, short, simple questions. Reinforce responses.

4. I always repeat the question to make sure I understand it. If I am truly stumped, I respond that I do not know or have not thought of that, "I will think about your question and get back to you on it by break this p.m." It is imperative to follow through with your promise. Often, a question is too general to respond to: "What if . . ." If so, I tell them to ask me during break, and be more specific.

5. Repeat the question back to the group. Admit that you do not have the answer and offer to get back to them.

6. (a)Have specific questions prepared. (b) Respond to their questions as well as you can and then ask: "Does that answer your question?" (c) Defer to the group for help.

7. Lay out ground rules in advance. Hold questions until end.

8. "Don't tell them everything--save some stuff for questions." Gary Wolford.

9. (a)Write out the questions before class. (b) Use techniques like repeating back vague questions to be assured you are answering the question. If you are not sure of the answer, ask if anyone in the class has a response or offer to find out the answer and get back to them.

10. A condition of participating in my seminars is that there are no dumb questions. The only dumb question is the one that is not asked. I invite questions. I also disclose that I do not have all the answers. I request that participants contribute when someone asks a question and they have information for the answer. I will also redirect a question back to the group to solicit their opinion before I give mine.

11. Plan! Plan! Plan! Structure! Structure! Structure! Write out key questions in advance WAIT after asking a question to allow thinking time. Use questions for a purpose, to achieve a learning goal. Throw some trainee questions back to the group. Don't be afraid to say, "I don't know. Can anyone in the group help us out?" Use the group's expertise.

12. (a)Answer them. (b) If they are dumb questions, say something like "Huh? I'm not sure I understood the question. Could you ask it another way?"

13. My most common technique is to ask the group to help answer. This empowers them to think critically, avoids setting me up as "having all the answers," and gives me time to think.

14. I use a lot of the participants' responses. I let them discuss, rather than having me answering all the time. Only when they really do not know, even though I have led them to the answer, then I give them the answer.

15. (a)Paraphrase all questions. (b) Prepare by putting yourself in participants' place and imagining what questions they might have. (c) Say "I'll check on it," and get back to them.

16. (a) Great tool! If unable to answer, say so. Ask if anyone else knows. (b) Understanding the question is the key. If you know, give the answer. Here's my shoot-from-the-hip answer. Say I have an answer. Ask how everyone else feels. Questions from the blue: Bounce out to people. Use digging questions. "When this happens, how do you feel?" Don't badger people. Tell them what you are doing.

17. (a) Deflect to audience (but don't overuse this technique or you will lose credibility). (b) Buy time (I'm going to make note of that, think about it, or check with some expert source and respond later).

18. (a) I don't ask the audience as many questions as some trainers. (b) I always affirm those who raise questions and deal with them respectfully.

19. (a) Redirect back to audience or person asking. (b) Repeat question before answering (confirms understanding and gives time to think). (c) Acknowledge that I can't answer now, make written note and promise to follow with an answer. (d) Prepare ample questions and listen carefully to answers. (e) Part of plan is anticipating difficult questions and forming answers in advance. (f) Use humor: "I wish you hadn't asked that," and then wink and laugh.

20. Above question (adjusting instruction, response #20) causes a lot of questions to be answered among participants so peer teaching is used. I also ask questions and allow small groups to develop answers. I also have group one develop questions, group two review group one questions for fairness and clarity and then have group three answer group one's questions.

FEEDBACK

1. The hardest part is being nondefensive and asking the participants to clarify questions. A mistake that beginning trainers make when receiving feedback is not making sure that the learners take responsibility for their share when something does not work. I ask, "What could you have done to make this work better."

2. No response

3. Listen to what people say. Don't use their "air time" to think of your next move.

4. I make note if it is an isolated comment from only one person, or does it represent the feedback of the majority. If it represents the majority, I make changes on a "test" basis and record the results.

5. Conduct reality checks with the group on what is useful or what they need to know. Ask them for improvements on areas they want emphasized.

6. Outline up front how you will measure learning during the session--what behaviors you will look for. Example: "Trainees will give an example of ________."

7. Ask questions or present situations as you make your presentations.

8. This is tough. Have them fill out evaluations. They'll tell you.

9. (a) Conduct check points. Review the objectives covered so far and ask if the training has covered the objectives. Ask individuals during break how they think things are going.

10. I solicit feedback at every break to assure I am meeting participant needs. I will ask one or two people for an opinion of the session to that point. I will also ask for "buy-in" during the session to assure we are on target. I use days-end and end-of-session evaluations to improve my delivery style and to refine the content.

11. Build in activities that give feedback. For example, after a practice session on a skill, the trainer knows whether the group needs more practice, more information. ASK the trainees what concepts are causing them difficulties.

12. No response.

13. I have feedback forms for every workshop. I ask co-facilitators for feedback. I talk to participants.

14. I check with the participants very often about my instruction. I, in fact, do not instruct, I facilitate. I let participants do most of the instructing just to let them work in teams and share ideas. It is hard to explain. I follow Dr. Deming's philosophy.

15. Watch for verbal/nonverbal cues. Directly ask: "How is it going?" or "What would you like more of?" If real anxious, conduct a written evaluation at the midpoint.

16. No response.

17. One half of the population will show their responses on their faces; the other half won't. When people are quiet, look for nodding and notetaking. If not, stop and say, "I need some feedback. Tell me what's going on." Instructor is ultimately the best way to tell.

18. (a) I gradually learned not to obsess over critical feedback. (b) If I am in doubt about feedback, I check it out with the group for consensus.

19. (a) Practice a lot in other people's training sessions. (b) Ask for coaching. (c) Assign or ask an audience member to do this for me.

20. I have participants develop action idea lists. Periodically, they share what they've been learning. This tells me what's getting across and what isn't.

MEDIA, MATERIALS, FACILITIES

1. This only comes with experience. Murphy was an optimist when it comes to materials and audio/visual equipment. Plan, have extras, backups, you name it. Sometimes I ask myself a question: "What would I do here if no one had a workbook, the VCR breaks, and the overhead bulb blows?"

2. (a) Watch other trainers work. (b) Be sure you know how to fully operate anything you use.

3. The fewer the better--test everything prior to the session. Have or know the location of the nearest backup equipment.

4. I list every potential problem that could occur during the workshop and have preventive and contingent actions for each problem. For instance, if the overhead projector breaks down, I have the major overheads prepared on a flip chart as a contingency.

5. Be sure that you are reacquainted with the media and materials. In outside facilities know the name and phone number of who to call if something goes wrong.

6. (a) Be super-prepared. (b) Arrive early. (c) Set up and try equipment.

7. Carry a media survival kit with extra bulbs, extension cords, etc. Draw out room set-up in advance and make a checklist for materials needed.

8. Keep it simple--use media with "instant" backup capability.

9. (a) Practice using the equipment in the classroom. (b) Do not ever start out by saying "You probably can't read this." Reinforce your message--do not distract with poor visuals.

10. Facilities--When possible, I visit the facility the night before. I generally arrive one hour before the session is to start to set up my materials, complete my room, "make ready," and do a final checkout.

Materials--All materials are either carefully placed at each participant's workplace or neatly stacked and stored for timely distribution.

Media--All media equipment is checked for operation. Projectors are cleaned and focused. Audiotape and videotape sound levels are checked and "cued" for use.

Failure--When equipment fails I will take a deep breath, ask for help through prayer, and make a humorous comment about the circumstances. Then I will do one of the following: Take a break, locate someone to repair or replace the equipment, devise an alternative activity.

11. Have a Plan B if equipment doesn't work. Rehearse use of equipment/media.

12. (a) Expect breakdowns. (b) Have the information you will present via video, film, etc., in another medium. (c) Have backup media; form groups and give an assignment.

13. For a long time, I used a checklist to make sure I had everything. I carried a "security kit" with extra projector bulbs, microphone markers, etc. Just in case, I get there early, set up, and know my equipment.

14. I come one hour before the class to get ready. Before that I make sure that media person is aware about my requirements. I try all equipment before presentation.

15. As little as possible. I use flip charts and overhead projectors (low tech) because I've had many bad experiences. I always request a person to assist with videotape and I use the expertise of participants.

16. Get the class on your side. Does anyone know how to set this up? I've lost my place, let's take a five-minute break. Call a time out. Be honest with what's going on. "Anyone have any ideas about what to do?"

17. (a) Avoid talking about the audio/visual aid (i.e., "Now I'm going to show you an overhead"). (b) Always have backup (e.g., overhead and flip chart in case overhead blows. (c) Standard goodie bag (markers, tape, etc.).

18. Be prepared! Spare projection bulbs can save the day!

19. (a) Back up plans are essential. (b) Humor and "Let's take a break while I get help." (c) Get to facilities early and test.

20. Preparation and practice. I prepare much of my own media so I am comfortable with the content of my slides, transparencies, flip charts before use. I practice with each piece of equipment until I'm comfortable with it before the program. I have backup plans (alternative forms of delivery, spare bulbs, etc.) in case of breakdown.

OPENINGS AND CLOSINGS

1. Experiment and don't be afraid to try something you wouldn't do. When you find something that works well, tinker with it and improve it. The important thing is to make good transitions. The other thing is to know your group well (do they need structure, trust, warmth, data?).

2. (a) There are several good resources on "Ice Breakers." (b) "Closings" should involve the participants in summarizing for themselves: "What they will do different because of the workshop" and then discussing this with others.

3. Allow enough time for each participant to discuss his or her reasons for being there and avoid the cute games for getting acquainted.

4. All of my openings and closings include five points. The five points are always the same, but I may vary the anecdotes and stories to relate to the class. My openings and closings are always memorized, so I can concentrate on effective delivery and have fun with them, rather than being concerned with the content.

5. Get a couple of books on ice breakers and look for exercises that fit your style. A solid closing will summarize and recap with the objectives.

6. As an icebreaker during introductions I ask for "something unknown or unique" about the participants. This produces some funny and/or interesting things. I can almost always provide some personal comment or ask an additional question about the responses that helps to build rapport with the trainees.

7. Carefully plan opening with what, where, when, why, and how the information will be used. Close with summary of key points and review of objectives.

8. "Have a great opening and a great closing--everything else is fill"--George Burns.

9. (a) Tell them what you are going to tell them. Stories are dangerous because if they don't laugh or understand you are off to a flat start. Think about what will get their attention. (b) Don't short change the close. Review all of the major points. Often, I have the class tell me what they have learned and build on that. Prepare the key summary points well before the time of the close.

10. Opening--I usually introduce myself then ask all participants to introduce themselves or to interview the person next to them, then introduce that person. More critical in the opening is the clarification of expectations which I do with the attached class agreement sheet. I also detail the seminar objectives which I will work to achieve. I also ask each person to write down one expectation for the seminar. Those expectations are written on a flip chart and they are used in the closing. Closing--I conclude the seminar by reviewing each participant's objective and assess with the person how close we came to accomplishing that objective. Then I thank the people for their participation, using the class agreement sheet as my guide for the "thank you."

11. I go to books by University Associates and others for ideas on ice-breakers. I build a file of ideas., I make closings as simple as possible by revising my "five years from now" question and building a summary around that. I frequently end as I began, with the group providing summary or closure.

12. (a) Avoid gimmicks. (b) List the objectives and expected outcomes up front. Don't be seduced by the stage and do a vaudeville routine. (c) Close by summarizing and thanking them.

13. (a) Lots of energy at both ends--open and close. (b) Format for introductions all around--helps discussion later. (c) Thank participants (at close) for time and attention. (d) Challenge participants (at opening) to list expectations for the time they are spending.

14. Openings: I have my own tape on this. Steps: Greet people at the door, put them in teams right away and give them topic to talk about. Then comes introduction of the people first and after that mine. Then we develop objectives together. Compare them with the course objectives, etc. Conclusions: I use various styles (e.g., participants summarize on flip chart what they have learned and how they are going to use it, or they do it individually in writing after discussing it in teams, etc.).

15. Openings: I always try to tie it to subject matter and get participants to connect with each other around relevant subjects. Closings: Participants talk about what they have learned and applications.

16. Extremely important! On board (or whatever) write: "Who am I? Who are you? Why are we here? How does it work? Next thing is introductions. Make a concise statement of why we are here; a purpose statement. Couple this with a diagram. What is the core, the one thing that sums up the whole. To close the gap right away use analogy instead of list of objectives. Tell about what the day will be like. It's OK to get up and walk around. Ambiguity gets in the way. Say we'll be out of here at 4:30 sharp, etc. Closings: Concisely sum up what was talked about. Use initial analogy, visual, or model.

18. (a) I always try to use an anecdote that relates to the group for opening. (b) I often have participants share ideas as a warmup. (c) In closing, I often go around the group asking them to share an insight or something they learned.

19. These are what I plan and rehearse most--completely prepared and comfortable even if I'm facing what's in between. (b) Always relate: Purpose, audience, agenda, ground rules. (c) Ask audience to help: Openings equal hopes fears, expectations; closings equal "I learned I still have a question . . ."

20. I ask three questions about each opening: Does it break preoccupation? Does it facilitate reworking? Does it make a point about the training?

DEPENDENCY ON NOTES

1. I use 5" x 7" cards with topics on them and the flow of the event. No one seems to mind. But this is another reason not to work alone. Partners give you time to review, so that you don't have to have three hours in your head. Just the next 90 minutes.

2. What's wrong with notes?

3. Learn your own material.

4. Memorize the opening and closing. Practice the material in between in front of 1-2 friends or peers. After that the visuals (slides, overheads, flip charts) should be enough prompting to recall the information. Also, there is nothing wrong with referring to notes, as long as the trainer DOES NOT read them word for word. Notes should be used for reference only. Practice. Practice. Practice.

5. Encourage new trainers to use notes on the transparency frame or to learn to speak from an outline. Dependency on notes really feeds into the credibility issue.

6. Just use outline notes. Then I make specific notes on my copies of the handouts.

7. Have them. Review them in advance. Use lots of media--slides that have information on them.

8. Practice until you can deliver from key words. Put key words on the overheads.

9. Practice--so much that you just need to see the key word to know what you were going to say.

10. My leader's guide is a must. I use it regularly. Most often, I review the leader's guide when the participants are in a work activity. I will catch myself making comments like, "Let me check that we have covered everything," or "Let me check what we need to do next" and then take time out to check the leader's guide.

11. Begin with a longer script. Scale down to an outline. Then put it on notecards. Get the outline down to two or three notecards. Use flip chart sheets or an overhead to outline key points in a presentation or activity. Use them as a learning aid for trainees and notes for yourself!

12. (a)No one completely "outgrows" the need for notes. (b) Practice with the notes so you won't look for them or lose your place.

13. For complex information, I will use notes for most material--practice until it is second nature. Then it can just flow.

14. My leads are usually overheads. And a few notes especially at the beginning. Also handouts. I prepare them as a manual and we try to follow them. Also I practice. I prepare myself carefully for the beginning of a course or a session. I have the structure not on paper so much, but in my head.

15. Use one-word phrases to key a major idea (rather than having more extensive notes). Speak impromptu off the one word after preparing. Use flip charts/overhead key one word or phrase.

16. Honesty is the best policy. "There are a couple of sections I've been playing around with . . ." I need my notes. Constantly looking at notes must be explained. Once you do that it's not a problem. "I will read this because it's important that you understand it very well."

17. Notes on transparency frames. My lesson plan is stapled together so I can pick it up, walk around with it freely. I'm very open about having notes but use them only as a prompt.

18. I have always worked from sparse outline and don't feel comfortable reading, except specific quotes, data, or definitions.

19. (a) Rehearsals. (b) Cheating (i.e., use of flip charts, transparencies--with notes on frames of transparencies or in pencil on top of flip charts). (c) Build a mind map on one page (e.g., core-satellite system).

20. I use mind mapping in developing my presentations so for most content I have key words I can rely on. My transparencies, slides, and flip charts provide me with additional guides.

Appendix C: Experts Participating in the Survey

Experts Participating in Survey

Kathleen M. Albrecht
Minnesota Extension Service
University of Minnesota

Barbara Arney

Marilyn Corrigan
Northern States Power Company

Chuck Hickok
Profile Technologies`

Marcia Hyatt
Minnegasco

Mary Osgood
Executive Development, Inc.

Milton Miller
Milton Miller and Associates

William F. Monson
Kotz Graduate School of Management

Brian Murphy
The HRD Department, Inc.

Susan Peterson
The HRD Department, Inc.

Robert Pike
Resources for Organizations

Gene Poor
Good Displays

Louis N. Quast Jr.
Personnel Decisions, Inc.
Training and Development Division

Charlotte Sebastian
Wilder Foundation

Arlan L. Tietel
3M Company

Hana Tomasek
INCOS

Harry Woodward
Wilson Learning

Thomas Wright
Thomas Wright and Associates, Inc.

Ron Zemke
Performance Research Associates, Inc.

Steve Zitnick
HB Fuller